User Guide

v9.1

Imprint

evasys GmbH

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Overview

Table of Content

A General Notes

This online help is intended to assist you in your day to day operating of the software evasys. The structure is based on the operating steps of the evaluation. Following the first three chapters that relate to the basics of the system, the initial operation and security, specific operations are introduced as and when you need them during the evaluation. The help follows a so-called “phase model” that illustrates the workflow, which you may have already come across during evasys training. It will be dealt with in depth in this manual.

The part General Notes deals with the most important introductory questions:

- Which evasys manuals are available and where do you find more information?
- What does the structure of the system look like?
- How do I start to work with evasys and how can I save my data while working?

The part Evaluation Process is about the workflow of the evaluation:

- Workflow in evasys
- Setting up the Organizational Structure
- Implementation of Surveys
- Reporting in evasys

In the part System you will find an overview of important system settings:

- System Management and Summary
- Logs and System Information
- Configuration Settings

For a comprehensive introduction it’s best to work through the manual chapter by chapter. Should you wish to look up certain steps, the index will lead you to the topic in question.

When working with the manual’s PDF version, the index will also appear as bookmarks on the left-hand side of the screen, enabling you to navigate to the relevant chapter.

In addition, you will find an index at the back of the manual, where you can look up important terminology and topics.

1. Introduction

This online help introduces the system’s possibilities and abilities with a strong emphasis on the administrator’s access. It addresses users without any evasys experience as well as experienced users who wish to reference something specific. Hence, it provides an introduction into the utilization of the system as well as offering answers to questions related to particular topics. Apart from a few exceptions, neither experience in programming nor technical knowledge is necessary.

1.1. Notes for Cloud Standard Users

This manual describes the functional content of the evasys Suite. In evasys Standard Cloud Systems not all documented features are available. Depending on the Cloud status, the following functions are not available or partly available:

Function	Cloud Standard	Chapter
Create active accounts	No	A 2.3.2. B 3.23.
Define user rights (QM-View, Create Questionnaires)	No	B 2.1.2.
Central system settings in the evasys settings	Partly (available options are marked “Sub“)	A 3.2. A 3.3.6. D 2.5.
Manage text templates on system level	No (only questionnaire level)	A 3.3.7. D 2.1.
Define organizational data	No	A 3.3.1.
Define course types, periods and custom titles	Yes	A 3.3.2.
Create subunits	No (only edit subunits)	B 2.1.1.
Tree structure	No	B 3.19.
Instructor‘s optional questions	No	B 3.20.
Module Evaluation	No	B 7.
License Management	No	D 1.7.
Scanstation Setup	No	D 1.8.
Scan Upload	Yes	B 4.2.
Inferfaces	No	D 2.4.
LDAP	No	D 2.4.3.
Re-Import raw data	No	B 3.17.7.
VividForms Designer as add-on	No	B 2.3.1.
ICR (handwriting recognition) as add-on	No	B 4.4.4.
PDF report plugins	No	B 4.7.10.
SOAP-API	No	
LMS Integrations	No	--
Additional scanstations	No	--

Table 1: Cloud Functions

Cloud Standard Users should note the following:

This manual describes all evasys functions from the administrator's perspective (evasys Premium). The Cloud Standard system is managed by a subunit administrator whose functional range is limited (see table above). The structure of the administrator account equals the one of the subunit administrator. This is why the content of this manual can be easily transferred to the subunit administrator. All functions which are not available for Standard Cloud users are marked in the manual by a note behind the title of the corresponding chapter.

1.2. Information for Users of the Research and Teaching License

This license option allows you to create active user accounts within the scope of research and teaching and enables surveys to be conducted in collaboration with external organizations or within the framework of third-party funded projects (non-profit).

Features of the research and teaching license	Extension to evasys suite Admin/subunit admin/active user	Single license Admin/subunit admin/active user	Chapter
Create active user accounts	Yes/Yes/No	Yes/Yes/No	A 2.3.2. A 3.3.2.
Define user rights (QM-views, questionnaire creation)	Yes/Yes/No	Yes/Yes/No	B 2.1.2.
Central settings in the evasys configuration	Yes/Yes/No	Yes/Yes/No	A 3.2. A 3.3.6. D 2.5.
Manage system-wide text templates	Yes/No/No	Yes/No/No	A 3.3.7. D 2.1.
Define organisational data	Yes/No/No	Yes/No/No	A 3.3.1.
Course/topic types, define periods and custom titles	Yes/No/No	Yes/No/No	A 3.3.2.
Create subunits	Yes/No/No	Yes/No/No	B 2.1.1.
Create questionnaires	Yes/Yes/Yes	No/No/Yes	B 2.3.1.

Table 2: Overview Research and Teaching license

1.3. Text Conventions

In this help, we have collected examples from the program interfaces for users of our Education Suite, Healthcare Suite, and Corporate Suite. The difference in design for each Suite is described in more detail in chapter A 2. “Basics”. Differences are marked within the text.

Menu names are set in quotation marks: “menu name”

Buttons are set in angular brackets: [button]

All paths concerning the database are related to an installation with a MySQL database. If you use an MS SQL database, please ask your database administrator for the appropriate path.

All paths to the evasys tree are specified for the use of an IIS Web Server (Standard path C:\inetpub\wwwroot\evasys\). The name of drive C: is to be replaced by the drive name of the respective server.

1.4. Manuals and Data Resources

In the following you receive an overview on the manuals and example files available for evasys and its special components.

About this Guide

The user manual is available to you as online help in the system. You can reach the online help directly from evasys by clicking on the question mark icon, which is always at the top right of the screen.

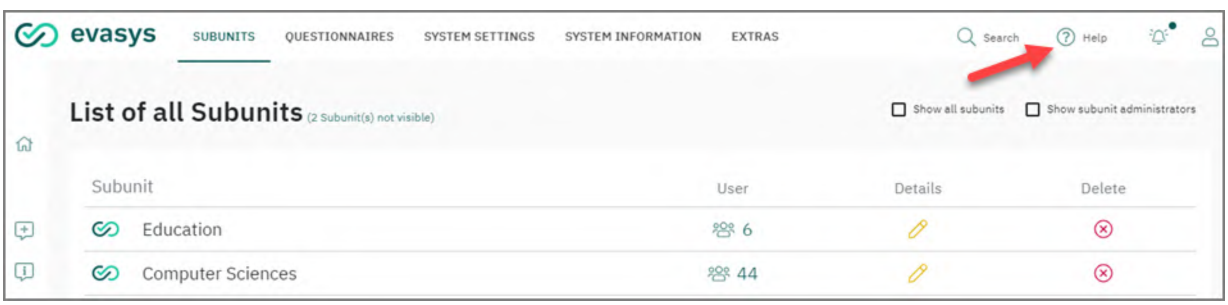


Figure 1: Opening the Online Help

By clicking on the question mark icon, a box opens for quick search in the help. The field is initially set to the particular context of the appropriate term. But you can also insert a term by yourself.

Further Manuals

Apart from the user guide, the following manuals are available:

- the manual “Quick Start Guide” which provides an overview of the most important features of your work with evasys. It is designed as a guide for beginners and helps you off to a quick and easy start;
- the manual “What’s new in evasys”, in which all of the newest innovations in evasys are listed, compared to the previous version;
- the „VividForms Editor Manual“, which is a guide to creating forms using the VividForms Editor

- the “VividForms Designer Manual”, which is a guide to creating forms using the VividForms Designer;
- the “Scanstation Manual” which describes the scan process;
- the „Technical Guide“ which covers all technical topics around evasys compactly bundled in one manual

All manuals listed here can be accessed by administrators and subunit administrators as PDF files directly in the evasys menu “System Information/Manuals”.

In addition, all manuals are, by default, stored in a directory on the server, under C:\inetpub\wwwroot\evasys\doc (drive C:\ may need to be replaced with your server name). The “Scanstation Guide” is available in the dialog of the Scanstation, the “VividForms Reader Manual” can be found in the dialog of the VividForms Reader.

In each active users account, the “Manual for Active Users” is available for guidelines, as well as the manual “Creating Questionnaires with the VividForms Editor”.

Note:
All PDF manuals are provided with linked bookmarks so that you can navigate comfortably. Should the linking not work, please check that the option “View documents in PDF/A mode” is set to “Never” in the settings of the Adobe Reader (menu “Edit/Preferences/Documents/PDF/A View Mode”).

Sample Files

In the menu “System Information/Sample Files” there are a number of example and sample files that you can use to test different functions in evasys, such as the CSV import of users and course participants, imports into the question library, uploading a custom cover letter for the PDF report, etc.

Extras

In the main menu “Extras”, you have access to various free and commercial content for your evasys system. The Extras menu will be automatically updated when new content is available and as long as the check for new content is activated in the system settings (menu “Settings/evasys Settings/Functions/Extras menu: Check for new content”). If new, unread extras are present, there is shown a “+” icon right above the menu entry.

Here you have example templates for questionnaires, video tutorials for independent familiarization with the software, information on new program enhancements and data protection.

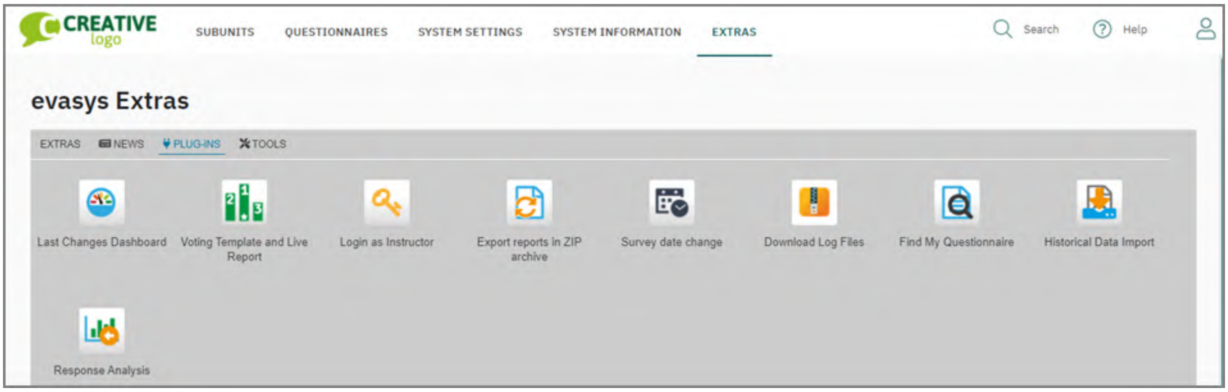


Figure 2: Menu Extras

The various items are arranged according to topic. When you select a topic you are shown all the items and add-ons available in this section. You can call up information on an item, download this directly using the evasys interface (if it is a free extension), or request further information or a quote for services.

In order for these to be correctly displayed, the computer on which you access evasys has to have an Internet connection. If this is not the case, a corresponding message will appear in the menu section.

The Extras menu is displayed in all administrator and subunit administrator accounts. Under "System Settings/evasys Settings/Functions/Extras menu: Display mode" you can define, if the menu displays in active user accounts (instructors/trainers/project managers), so that these type of users can also access useful tools like manual, video tutorials, etc.

1.5. Web Accessibility in evasys

The HTML content generated by evasys is optimized for accessibility. Particularly for participants of online surveys, special aids are built in to the display output. Such content can be detected by screen readers and voice output can be used for a better understanding. This allows blind people to take part in online surveys easily and without complication.

Evasys GmbH follows the standards set forth in the "Web Content Accessibility Guidelines" (WCAG 2.1), which in turn are based on national guidelines (such as BITV or ADA Section 508). From a technical point of view, the presentation of online surveys is barrier free in accordance with the strict guidelines of the WCAG 2.1 Level AA. However, the creator of questionnaires and online templates must consider certain aspects in order to provide complete barrier free access to the online form. For more details, please refer to chapter B 3.15.2. "Customization of the Used Layouts".

As part of the evasys GmbH quality management, the graphical interface of the complete system is tested for Web accessibility using suitable tools such as "WAVE" (http://wave.webaim.org/).

2. Basics

The evasys evaluation system was developed to provide various institutions with an effective tool for broad execution and evaluation of surveys as part of quality management. The system works with either paper or online surveys.

2.1. Derivates and Languages

evasys is currently available in three different system derivatives. These come in different colors and in some cases use different terms, but their operations are identical:

- Education Survey Automation Suite is specially designed for use with teacher evaluations and other educational institutions; its system color is green.
- Healthcare Survey Automation Suite is specially designed for quality assurance use in clinics and medical training centers; its system color is blue.
- Corporate Survey Automation Suite is a feedback system for seminar providers and other organizations; its system color is red.

For educational institutions (standard language for the Education Survey Automation Suite) the term 'instructors' is used, while the terms “Trainers” and “Courses” are used for the corporate world (standard language for the Corporate Survey Automation Suite); for the neutral version (standard language for the Healthcare Survey Automation Suite) we use the terms “Project” (and project manager) and “Topic.” In the menu “System Settings/evasys Settings/General” a different system language can be selected. The following table gives an overview of the differences between the various system languages:

Higher Education	Seminar Providers	Neutral
Instructor	Trainer	Project
Course	Course	Topic
Dean	Manager	Department Head
Dean of Studies	Program Manager	---
Program of study	Program of study	Group
Secondary Instructor	Secondary trainer	Further report recipient
President	President	---
Course type	Course type	Topic type

Table 3: System Languages

A major part of the evaluation is the creation of questionnaires. Evasys offers you two tools for creating questionnaires: the VividForms Editor and the VividForms Designer (optional). This manual includes a chapter on the standard VividForms Editor. For the advanced VividForms Designer, we offer a separate manual available in the System Information / Manual section of evasys.

First, you learn how evasys is structured and what components you are using. Then some important basic concepts in evasys are explained. Since the centralized and decentralized evaluation represent two fundamentally different concepts to give you these are then briefly presented.

2.2. Basic Terminology within evasys

Within evasys, you will come across some terms repeatedly. Due to their importance, their meaning is outlined below:

Quires

Questionnaires may be several pages long. The complete copy of a questionnaire, including all its pages, is called quire. As soon as more than one sheet of paper is added to a single questionnaire, ONE quire is created. Quires may also be known as “booklets” in other applications.

Instructor Accounts: Active - Passive

Surveys are always created for particular instructors and courses. Therefore, a course instructor is required within the evasys structure. These instructors are managed centrally by the administrator. Instructor accounts can be active or passive:

- We talk of a passive instructor account when only the administrator can access the instructors, for example in order to create surveys centrally for the instructor’s course.
- If the instructor himself is additionally authorized to log-on to create questionnaires or surveys, we talk of an active instructor account (also see chapter A 2.3.2. “Active Instructors Accounts”).

Questionnaire

In evasys, the term “questionnaire” may have two meanings:

- Firstly, in evasys it refers to the file which serves as a template for a questionnaire and determines the layout of a questionnaire that is used for numerous surveys.

  In this case it is a PDF file that contains the questionnaire and determines which options for questions and responses appear in what design on the questionnaire. This template can be used for creating both paper and online surveys (however, in the case of online surveys with VividForms questionnaires, the design is not defined through the questionnaire).

  The footer of a VividForms questionnaire contains for example the word “SAMPLE” instead of a barcode.

  This is what is usually referred to when a “questionnaire” is mentioned in the manual. This also becomes clear in the respective context.

- Secondly, when creating a survey, you of course receive a particular questionnaire which you pass on to the respondents.

  As soon as you create a paper survey, a copy of the sample questionnaire is created and the variable areas of the questionnaire for this survey are filled (hard copy procedure).

  If you do not wish to receive a new print template for each survey, the questionnaire's blank version can also be used (cover sheet procedure). In this case, the personalized areas of the questionnaire remain blank: only the barcode area contains information about the questionnaire, including the page number.

  In the case of VividForms questionnaires, online surveys are possible as HTML surveys. When creating an online survey, the HTML questionnaire is automatically created in accordance with the layout of your questionnaire (your PDF template). Of course, you have the option of changing the layout of the online survey (using online templates). For further information, see chapter B 3.15.2. "Customization of the Used Layouts".

NonForms

A non-form is a scanned page that is not recognized as a form.

This may be the case when you:

- scan a questionnaire that does not yet exist in evasys. Then the VividForms Reader cannot read this form.
- scan an evasys form that is faulty in some way. For example, the forms were scanned in askew, which damages the corners needed for alignment. The form can not then be identified.
- scan something completely different, for example, in order to test the scanner. These image files will also be treated as non-forms.

If the VividForms Reader recognizes all forms of a batch as NonForms, these are stored in a so-called NonForms folder. If at least one page is recognized as an evasys form, the batch is stopped and a dataset consistency check has to be carried out. Both processes run in the scanstation and are indicated there (further information: "Scanstation manual")

Survey/Survey Process

Conducting a survey in evasys is a process based on a questionnaire. In order to create a survey, you have to select an existing questionnaire in the system and thereby generate a concrete survey.

A personalized copy of the questionnaire template is created and linked to this particular survey (hard copy procedure), or, respectively, a cover sheet for the survey is created which supplements the standard questionnaire with survey details (cover sheet procedure). The related survey is identified through a distinct mark (in the case of VividForms, for example, a barcode) on the personalized questionnaires or on the cover sheet respectively. This distinct mark is read during processing. Only the correct identification of a survey by means of this number enables the correct assignment of generated data to a particular survey in evasys.

2.3. System Access

Within evasys, you have two options for governing responsibilities for surveys.

The first option, which is usually used for regular evaluation processes, is the so-called “central evaluation” option. In this scenario, a central evaluation office takes care of the evaluation’s coordination. For this purpose, central administration accounts are used, which are responsible either for the entire organization or individual organizational units.

For the second option, you may authorize individual instructors to create and conduct their own questionnaires and surveys. This is what is called “active instructor accounts”.

2.3.1. Central Evaluation

A Central Office controls the Evaluation. The central evaluation is tailored to a service and competence center, by which the entire evaluation is handled.

The instructors will only have indirect contact with evasys insofar as that after completion of a survey an email will be sent to them, outlining their evaluation results. Through further feedback options, instructors can receive comparative reports (comparing their own course to others in the course of studies and/or the faculty) or – prior to a survey – they can add their individual questions to the predetermined questionnaires.

At the end of an survey period, summary reports for deans (of studies) can be submitted and the collected raw data can be transferred for the implementation of further analyses in statistics programs such as SPSS or Excel.

This means that the system is managed and organized by a central entity. The Administrator works together with other user roles such as secondary administrators or subunit administrators. The evasys administrators create the structure as well as the questionnaires, create the surveys and pass on questionnaires and reports.

This principle is illustrated in the following graphic:

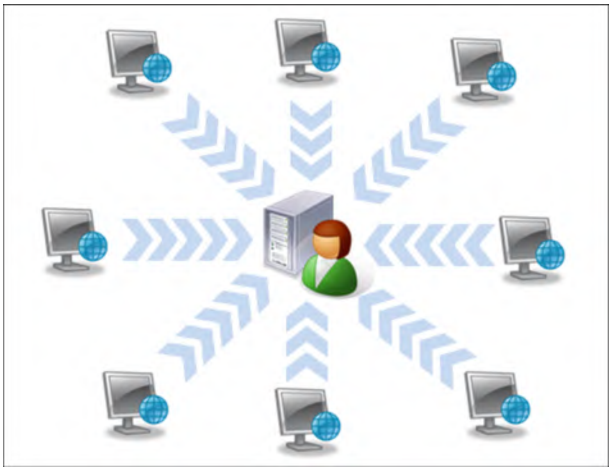


Figure 3: Central Evaluation Model

The central entity – the evasys Administrator – is responsible for the evaluation process and ensures that the questionnaires created for the surveys are given to the teachers and then collects them again. In the centralized management of evasys the Administrator is responsible for system administration and configuration. If desired, the tasks of the administrator can be distributed across other user roles (secondary and subunit administrators).

2.3.2. Active Instructors Accounts

(Not in Cloud Standard)

In addition to this central control of the evaluation process, you can select individual users and allow them to carry out further individual evaluations. This could be, for example, instructors (education language), trainers (seminar language) or project managers (neutral language) who wish to conduct their own surveys.

This means that the administrator – as the central body – can create active users or use those already in place. These subsequently require their user name and password and can log on to the system through the usual evasys login screen.

Via their user accounts these users can then – depending on their type of authorization – implement all evaluation steps themselves. This applies to:

- creating questionnaires. The administrator assigns the right to create questionnaires per user. Hence some users can create surveys, however, they can only use those questionnaires that are preset by the administrator.
- the implementation of paper and online surveys. With existing questionnaires, active interviewers can create new surveys as they see fit.
- the processing of a survey. After evaluating the data, an active instructor automatically receives the survey's result which can be edited, for example by summarizing it with other reports, establishing subgroups based on specific criteria (such as age, gender, etc.) and so on.

- the export of data as a CSV file for use in statistical tools such as SPSS. Also active instructors can, of course, edit the results of their surveys further in other programs.

Just like the administrator, active instructors access evasys via a web browser. This means that they can theoretically access the system from any PC that has internet access (unless the administrator applies certain restrictions for security reasons). As is the case with administrator's access, security is accorded through a log-in, only accessible with a password as well as the option to use SSL-encryption.

With paper surveys, the questionnaires are collected via decentralized Scanstations which are operated by the instructors themselves.

The active instructor accounts can be used in a variety of ways, for example:

- An instructor of psychology or sociology wishes to collect data during a research project using evasys. This way you can give the instructor the opportunity to generate empirical data.
- Students/postgraduates often base their work on empirical surveys. The evasys administrator can assign an active account in evasys to the respective tutor (professor). In turn, the tutor can grant his students/postgraduates access to his account.
- Departments/faculties may need surveys that do not conform with centrally organized quality assurance surveys. These could be surveys from cafeterias and libraries, or surveys for customers, employees, or patients that can be regulated using active user accounts.

In the following graphic you can see this illustrated once again:

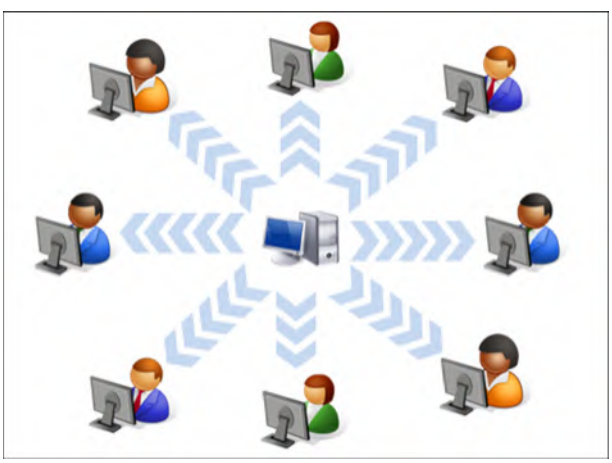


Figure 4: Active Accounts (in Addition to Central Evaluation)

The active instructors are partially responsible for the evaluation process and for example, creating the questionnaires for their surveys, handing them out to the students and collecting them again. To carry out and analyze surveys, the active instructor accounts require a "license to Evaluation".

Of course, active instructors are not able to access one another's results. Only the active instructor himself and the administrator/subunit administrator have access to the data. (If you have been using evasys for some time, it may be noted that this type of evaluation was formerly known as “de-central evaluation”.)

2.3.3. Logging into evasys: Entry Points

The evasys server offers users two entry points to login. You can put a link to the relevant entry point at an appropriate place on your university/company website.

Entry point for Instructors and Administrators

<EVASYS-SERVERADRESSE>/INDEXEVA.PHP

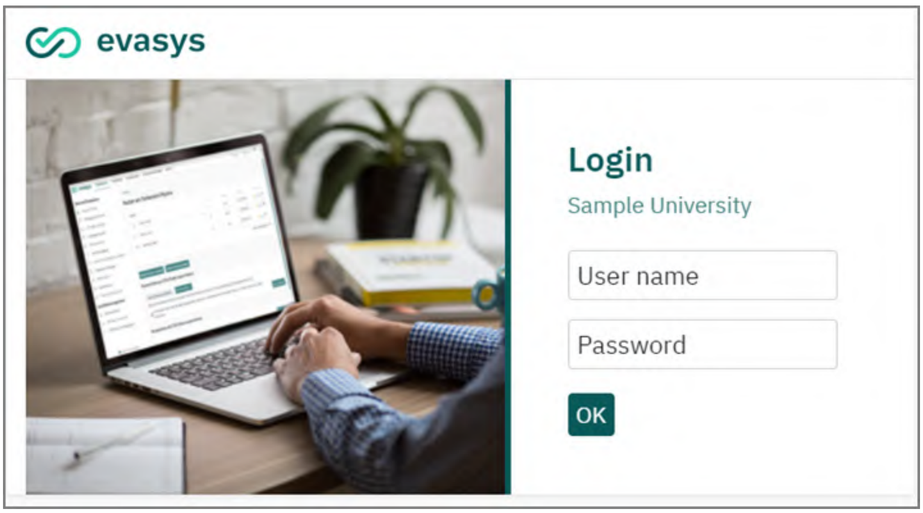


Figure 5: Entry Point for Instructors and Administrators

Portal for instructors and administrators. User names and passwords are required. When access is limited this page can be opened only from computers in the defined IP address domain for users.

Entry Point for Participants of an Online Survey

<EVASYS-SERVERADRESSE>/ONLINE.PHP

Figure 6: Entry Point for Participants of an Online Survey

Portal for voting in online surveys. A PSWD is required.

2.3.4. End User License Agreement

The first time you log in to the system, depending on which version you are using, information will appear on the End User License Agreement (EULA). You must agree to these conditions in order to use the software. A copy of the agreement is available to download or print for your use.

3. System Start-up and Security

The initial operation of your evasys server was carried out by a technician. This includes the installation and configuration of the required software programs, including the connection and testing of collection devices (production-level scanners). Finally the system is integrated into the local network so that the users have access to the system with their Web browser. The final step is configuring the mail server which sends reports and messages from evasys.

For maintenance purposes we recommend having so-called remote maintenance access, which allows our technicians to have direct access to your local evasys system so that they can quickly and systematically analyze and remedy any problem that might arise. The alternative would be a lengthy diagnosis via telephone.

3.1. Login Security

Warning Message when using the Standard Password

As long as the predefined standard login (admin/admin) has not been changed, a warning message appears when the administrator logs in with a prompt to change the user name and password. Both can be adapted in the menu “System Settings/My Profile” (see chapter B 2.1.2. “Generating and Managing User Accounts”).

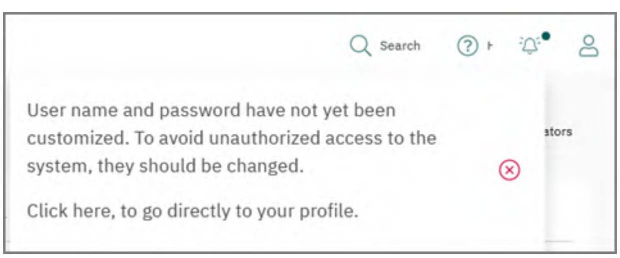


Figure 7: Warning message when using the standard password

Showing a CAPTCHA Graphic

evasys offers you the possibility of blending in a so called CAPTCHA graphic, after a defined number of failed logins from an IP address. This function protects evasys from automated attacks.

CAPTCHAs are graphics in which figures (numbers or alphabetical characters) are displayed, so that machines cannot read them. They are employed to detect whether the counterpart is a human being or a machine. If CAPTCHAs are activated, after multiple failed login attempts the user is prompted to enter a CAPTCHA:

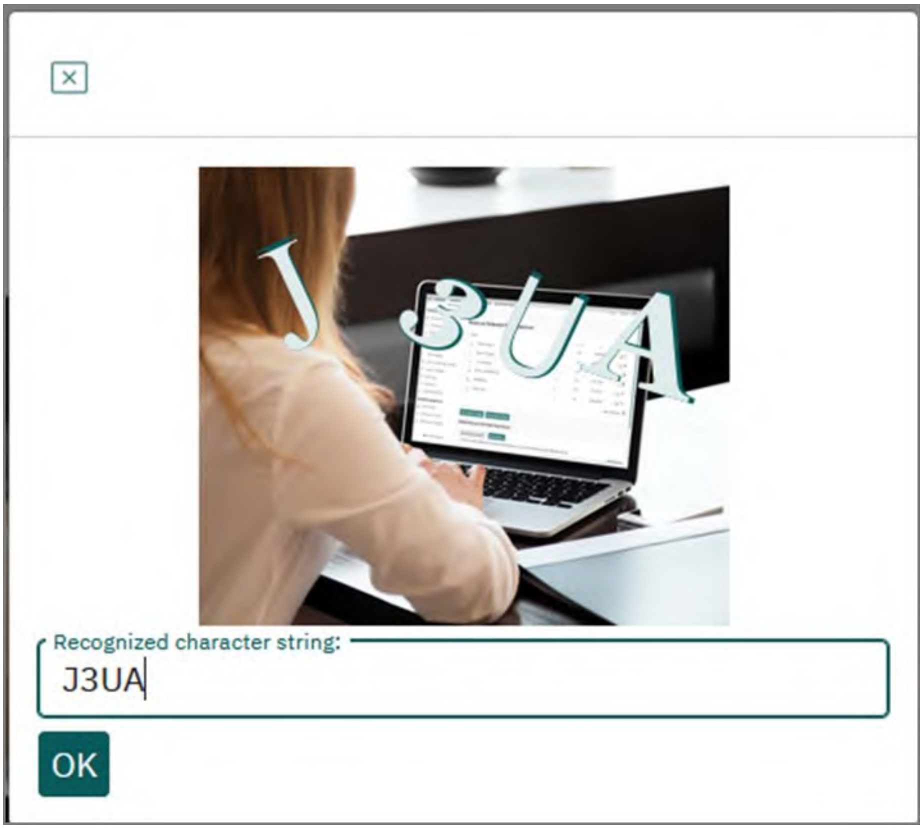


Figure 8: CAPTCHA-Function after several failed Logins

If the CAPTCHA is entered correctly, the user may repeat the login procedure.

You can activate CAPTCHAs under System Settings/evasys Settings/System Security. In addition, you can define the number of failed login attempts to trigger a CAPTCHA. The number of failed login attempts always relates to a time frame fixed by you (again, under System Settings/evasys Settings/System Security). Should a user fail to login correctly within the given time, s/he will be requested to enter a CAPTCHA. At the same time, the login screen will be blocked for the IP of the potential assailant for the defined time (in minutes). This block can be prematurely lifted by entering the CAPTCHA correctly.

3.2. Important Configuration Settings

(Partly Available in Cloud Standard)

Before you start using the system, the following general system settings should be checked and set up in coordination with your local IT department.

- Update Check
- Email Functions
- System Language
- Data Privacy

3.2.1. Update Check

Once the administrator has logged in, automatic checks for updates are carried out at regular intervals (standard value is 30 days). When checking for updates, data is transferred from the evasys system to the update server via the administrator's web browser (the evasys server itself does not connect to the update server). The following information is included:

- the customer name,
- the license key,
- the current evasys version,
- the default system language,
- the current configured language,
- the product derivative,
- the content of the configuration setting “server root path”,
- the ID of the supplier,
- a unique ID for the update check process itself, which is added for reasons of security.

This information is SSL encrypted in its entirety and serves solely technical purposes. No personal data or captured data from the system is ever transmitted.

If you do not agree to the transfer of the above mentioned information, this function can be deactivated in the system settings (“System Settings/evasys Settings/Maintenance/Automatic Update Check”). Independent of this function, you will be informed of available updates through other channels.

If the administrator uses a secure https connection to the server and if the main server path in evasys is also defined for https (like https://example.com/evasys) and a secure certificate is not installed on the server, the update check will not function.

As the use of non-secure certificates can cause problems at other sites, and browsers generally recommend not connecting to a server with an unsecured certificate, it is highly recommended to acquire a secure certificate. You will usually get further information on the certificates of your organization from your IT department.

You can also check the system manually for available updates at any time. To do this, open the menu “System Information/License Management”. In the section “Version” the currently installed version number is displayed. To check if a new version is available, click the button [Check for Updates]. A new browser tab or new window opens and shows the information, whether you are already on the current version of whether an update is available.

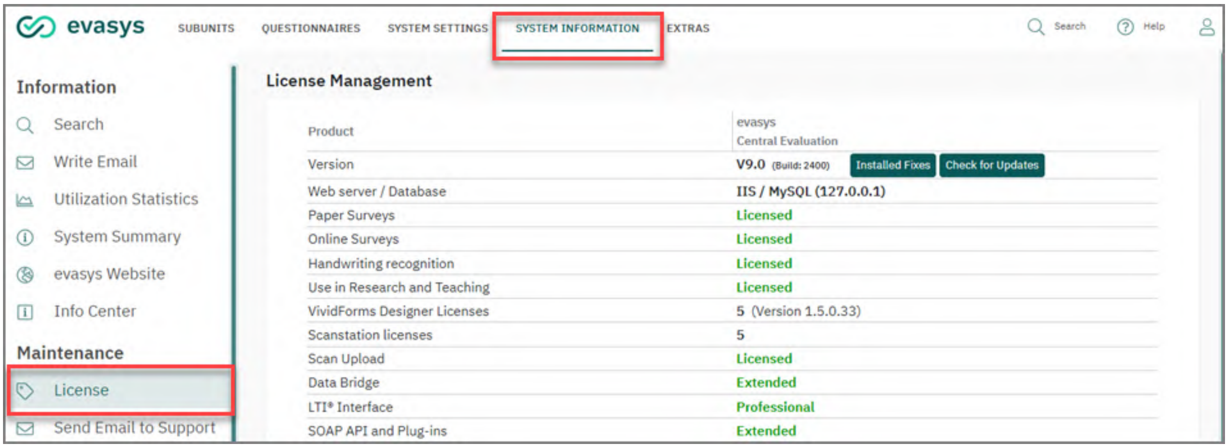


Figure 9: Manual check for updates

You will also find the button “Installed Fixes“, which will give you an overview of the installed fixes and if they have been installed correctly to evasys

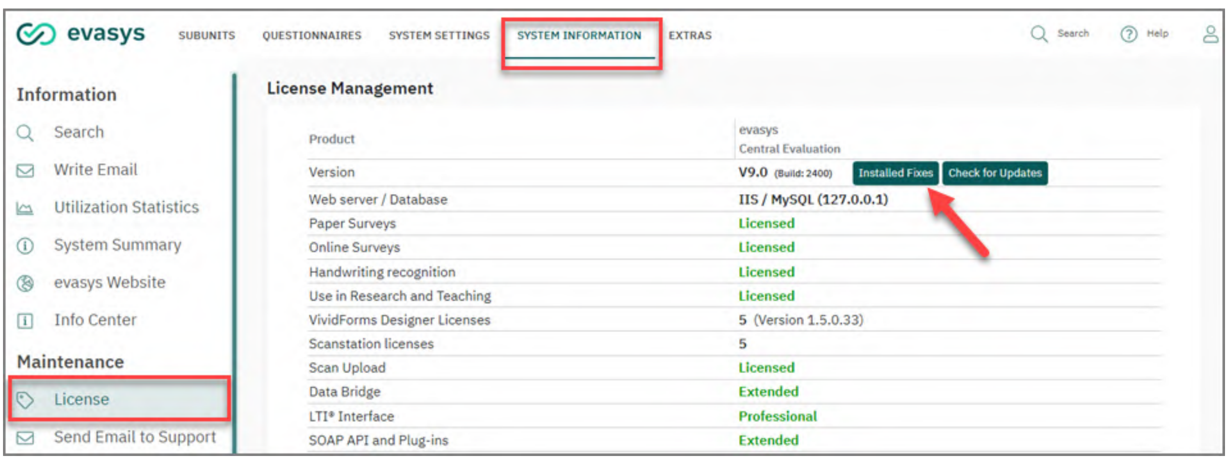


Figure 10: Installed Fixes

3.2.2. Email Functions

To support the communication in your evaluation processes evasys uses numerous email templates. For example, cover sheets, questionnaires, PSWDs for online surveys or reports of surveys are sent by email. This can be done manually or automatically by the system.

Some internal mail settings were already set up by our technicians during the installation. Before using the system, you should check the email features in menu “System Settings/Configuration/Email Functions & Accounts” in coordination with your IT department.

You can change the sender name and email address of all messages sent by the system. This setting is used to customize the system according to your needs. For example, you can enter your name and personal email address here. Thus, it is possible to obtain also answers to the emails sent by the system.

Figure 11: Change sender data

These settings can also be made available for subunit administrators so that they can make individual settings.

So as not to interfere with your internal network traffic by sending emails from the system, the maximum number and size of email attachments from administrators and subunit administrators can be limited.

Figure 12: Change email size

Some systems have problems with the transformation or representation of emails in HTML format, therefore this kind of formatting in the system can be disabled. If you want to format emails in evasys by using an HTML editor (bold, italic, underline, etc.), the setting “Emails in HTML Format” must be enabled.

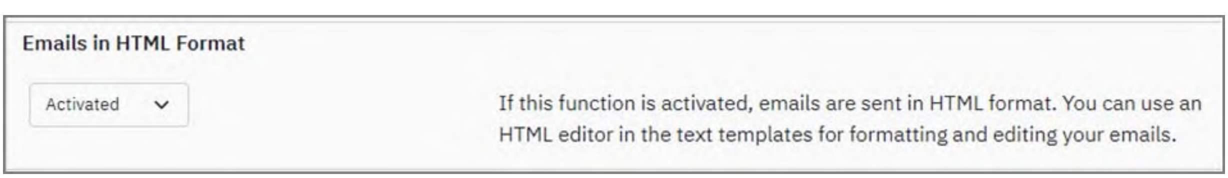


Figure 13: Enable HTML format

3.2.3. System Language

The standard language for the evasys user interface as well as the evaluation documents generated may deviate based on which version you are using. In an educational context (Education Suite) the system uses the terms “Instructor” and “Secondary instructor,” while for seminar providers or other training centers (Corporate Suite) the term “Trainer” is used, and for clinics or other companies, neutral terms such as “Project manager” (Healthcare Suite) come into play.

You can adapt the system language to your terms in the menu “System Settings/ evasys Settings/General.” This setting applies to the entire system, and can only be accessed using administrative rights.

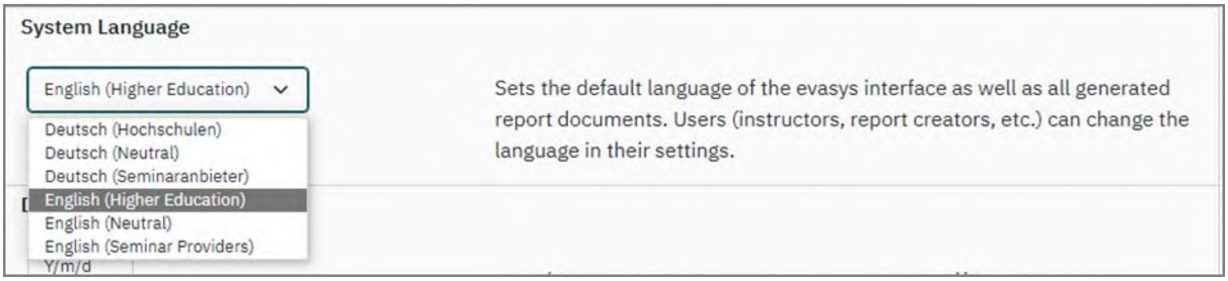


Figure 14: Setting the system language

Each user account can be assigned an individual language regardless of the system settings (see chapter B 2.1.2. “Generating and Managing User Accounts”).

3.2.4. Data Privacy

Be sure to check out the privacy settings, especially if you work with smaller groups of participants or want to perform non-anonymous surveys in evasys. See the menu “System Information/Information/Extras/Manuals” for a documentation of Data Privacy in evasys. For more information, please also see chapter D 2. “Configuration Settings”.

In order to protect certain system configurations, for example data privacy settings, from alteration, it may be prudent to have these configurations permanently set as 'unavailable' (read only) by our Support Team during installation. For this, internal coordination with other users and a written record in your internal process documentation are usually necessary.

The drop-down list is deactivated, so that neither administrators nor subunit administrators can make changes in the system. This is particularly important if you have several secondary administrators working within evasys, and wish to limit general access to your settings. In order to change these configurations, please contact our Support Team, as you will require a direct database modification to do so.

3.3. Adjustment to your Organization

Before creating the organization structure, some basic settings should be defined in the system. You can adapt the organizational data, the evaluation periods, course types and forms of addresses (if required).

- Organizational Data
- Configuration of the basic data

- Course Types
- Periods
- Custom Titles
- Adjustments in evasys Settings
- Adjustments in the Text Templates
- Adjustments in the Documents
- Adapting the User Interface

3.3.1. Organizational Data

(Not in Cloud Standard)

The profile data of the organization used by evasys for the evaluation can be adapted in the menu “System Settings/Organization”. Please enter all required information and click [OK] to save the settings.

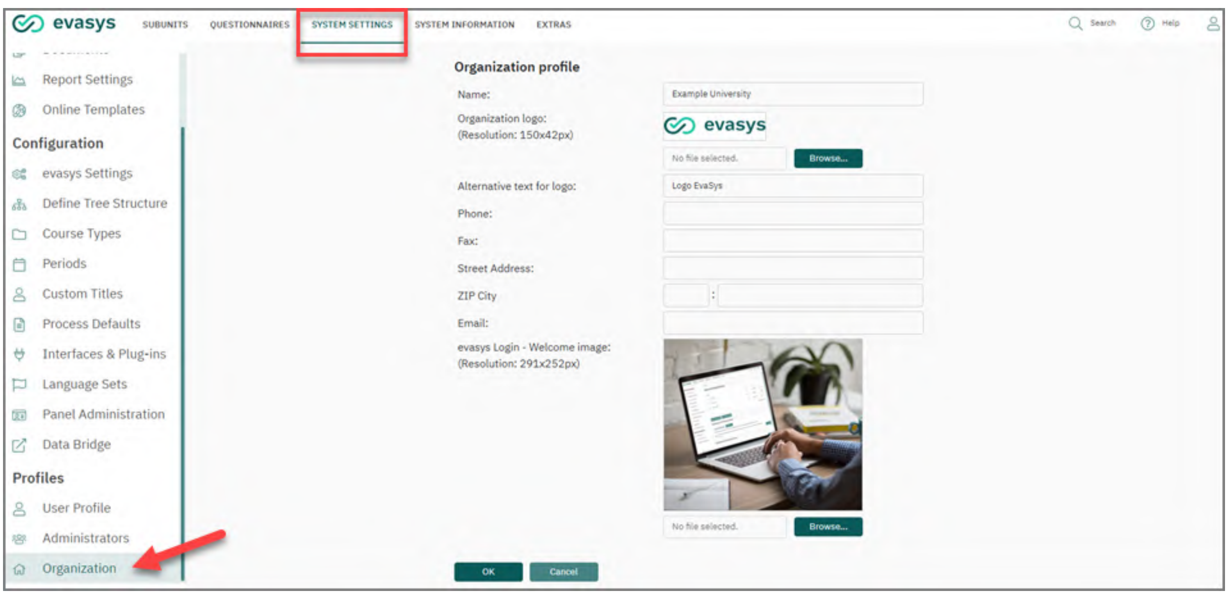


Figure 15: Defining Organizational Data

If desired, you can change the organization logo and the evasys login picture to your own graphic, for example to adapt the evasys layout to your corporate design. There are two buttons in the dialog which allow for uploading your graphics.

The organization logo is displayed in the upper left corner of the evasys system. It must have a resolution of 150x42 px. The allowed file formats are jpg, png or gif.

The evasys login image is displayed on the login page for evasys user. It must have a solution of 291x252 px and must be in jpg, png or gif format.

Note:

If you change the evasys login logo, please note that the new image should have the orginal resolution. Otherwise it will be scaled. If the image is scaled, the CAPTCHA which is displayed on three failed logins will also be scaled. Thereby, the readability might be impaired. Please always check if the CAPTCHA can be read when displayed in front of the image you have changed. For further information on CAPTCHAs see chapter A "Showing a CAPTCHA Graphic".

Hint:

Of course you can also change the login image for online surveys. For further information see chapter B 3.15.2. "Customization of the Used Layouts" .

3.3.2. Configuration of the basic data

(Not in Cloud Standard)

These menu items enable the creation of settings for course types, survey periods and custom titles. They are located in the left context menu (Configuration) in the main area "System Settings". This basic data is very important and should be permanently defined before beginning operations.

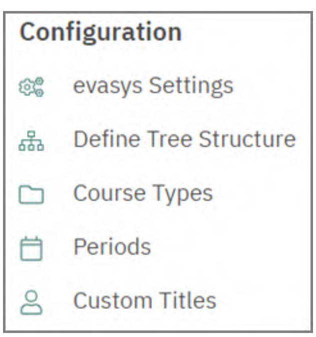


Figure 16: Course Types, Periods, Custom Titles

3.3.3. Course Types

Some default course types are already predefined by the system. You can change this list according to the needs of your organization. If you want to add a new course type, enter its name in the input box beneath the list and click on [New]. If you want to remove a course type from the list, click on the red cross.

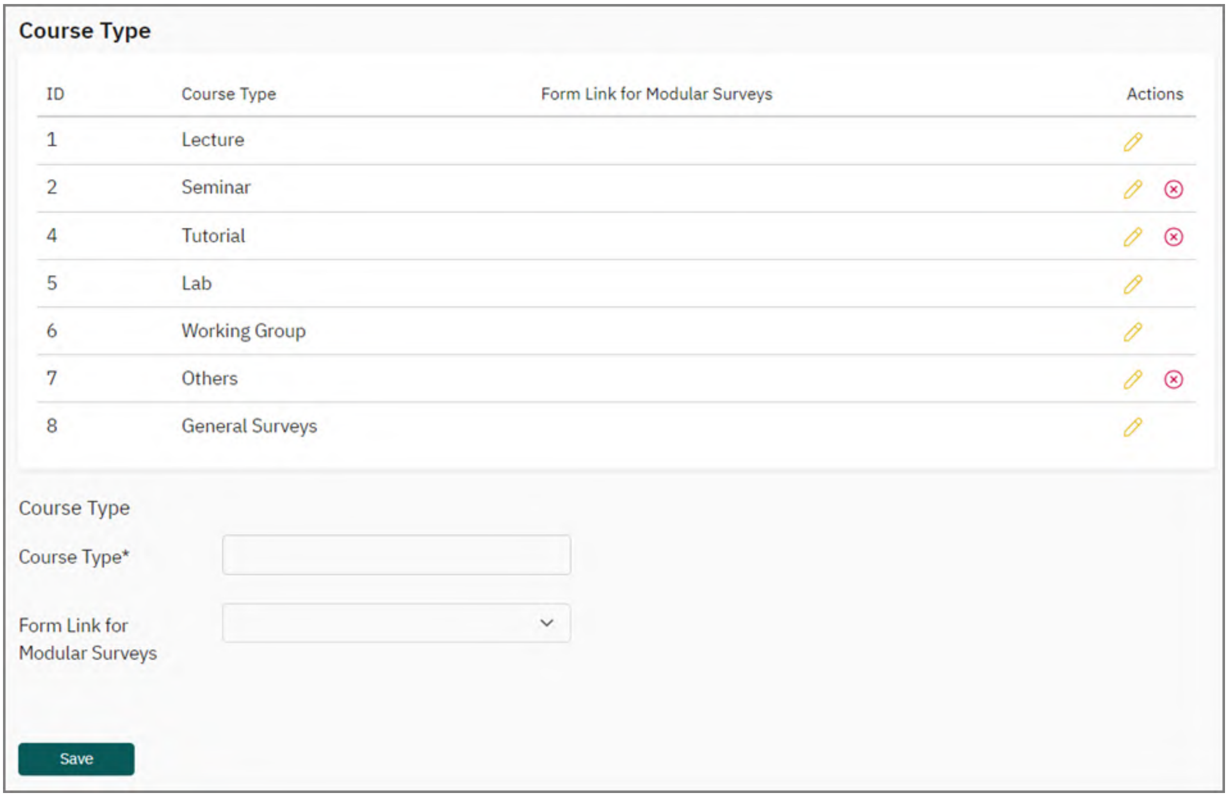


Figure 17: Course Types

Note:
You can only delete course types as long as they are not assigned to a course.

The numbers at the left represent the index of the table in which the course types are recorded. Using this key course types are allocated from the CSV import table, i.e. the index number 2 always corresponds to the second value from the top down.

Note:
If you already have existing data in the system assigned to these course types, you will create a problem if you change these values. When you make major changes in this area you must also correct the corresponding references in the course data in order to ensure that they remain meaningful.

3.3.4. Periods

A survey period marks the time in which ONE survey is completed per course and/or project. In higher education institutes, the courses are usually evaluated once a semester. For this reason, the evasys Education Suite has the survey period preset to one semester. Projects, such as customer, employee, or patient questionnaires are usually evaluated once per quarter. This is why the survey period is set at a quarter for neutral language systems. You can also set other periods if desired; odd calendar years, every six months, and so on.

Survey periods play an important role in enabling internal allocation to surveys including the image files from open questions. The survey periods must therefore be defined before beginning productive operations. We strongly discourage making changes in completed or current survey periods!

In order to set up a new survey period enter the name, enter the start date and the end date and click on [Save].

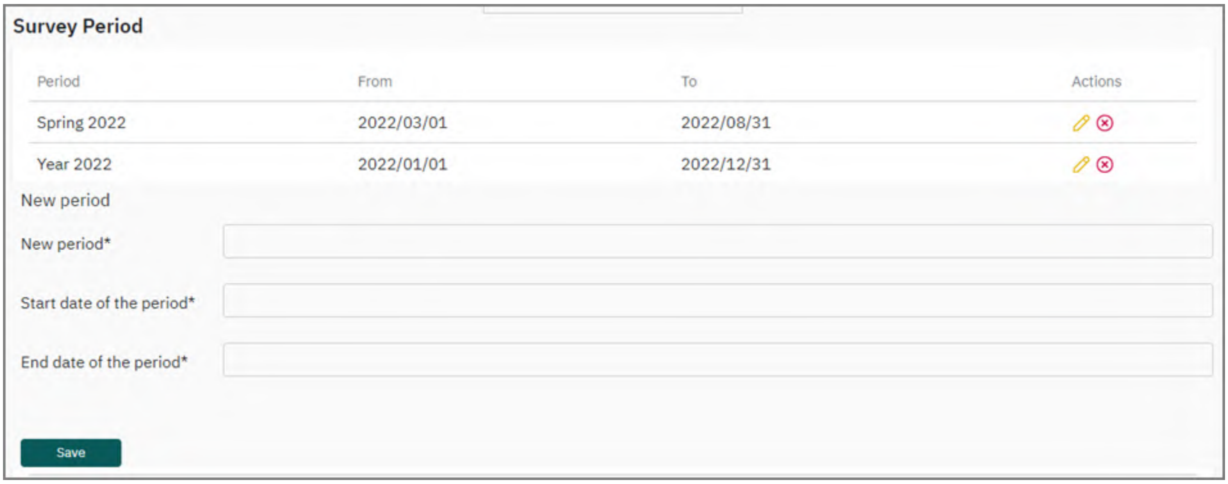


Figure 18: Periods

Please remember the defined date convention MM/DD/YYYY. The date format is defined in the menu “System Settings/evasys Settings/General/Date Format”. Overlaps of existing survey periods are allowed. For example, one period could be defined as from 1st of Jan. 2022 to 31st of Dec. 2022, name: Year 2022, e.g. add 1st of March 2022 to 31st of August 2022: Spring 2022.

Existing periods can be updated by clicking on the pencil symbol and modifying the entry fields in the area “Period” at the bottom of the page. Modifying the period names will not harm existing data.

3.3.5. Custom Titles

All identities in evasys have a title. The built-in titles are Mr., Mrs., Ms and neutral.

The menu “Custom Titles” allows the definition of additional titles. To do this enter a new title and a salutation text. An example title could be “Provost” with the salutation “Dear”. Save changes by clicking on the [Save] button.

The newly defined title will be used in the active system language. Translations of the new title may be added if additional languages are present in the system.

You can only edit your entered custom titles. By clicking on the pencil you can alter the salutation text and title in question. Afterwards save your changes by clicking on the button [Save]. A click on the cross icon deletes the form of address in the respective language. The new titles can be linked to the identities in the user profiles.

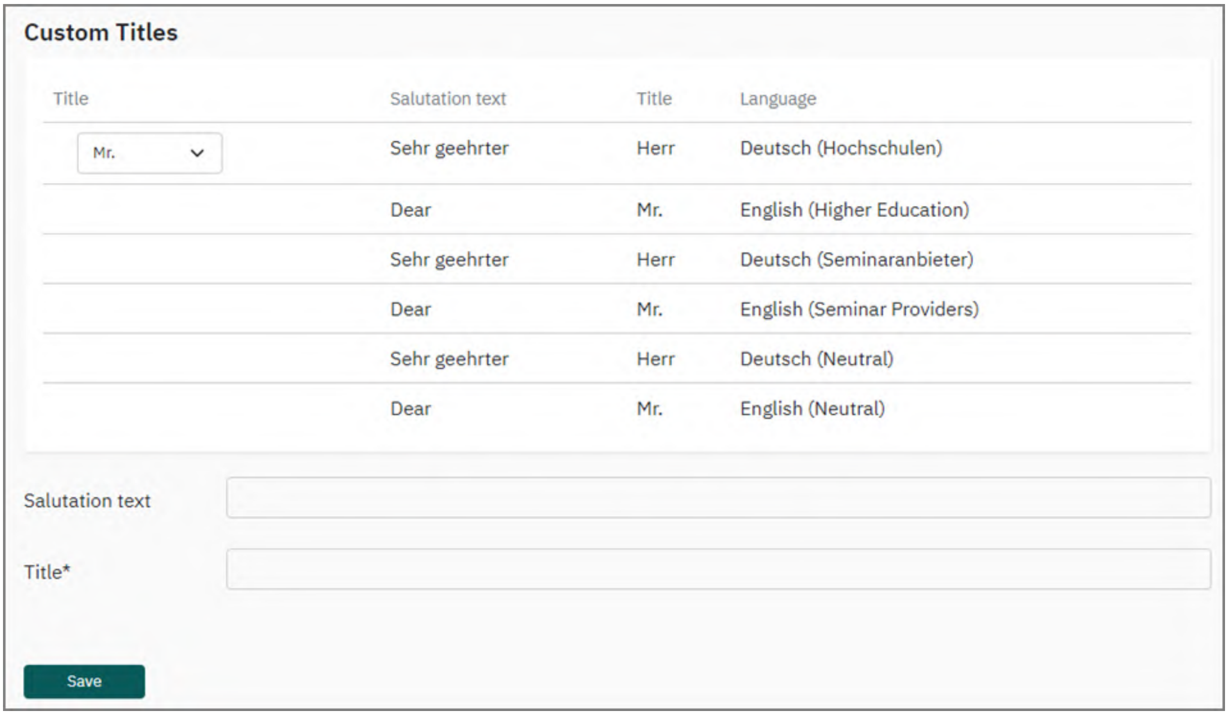


Figure 19: Custom Titles

The defined titles can be used in the CSV user import. The key word for the title is in the second column of the CSV file (see chapter B “”).

The configured title will be used for all emails or PDF reports which are delivered to the user. The placeholder [SALUTATION] in the email text templates will be replaced by the contents in this option area.

evasys has login screens, shows colors when working with the software, sends emails, documents etc. Many of those visible elements contribute to the appearance of your institution or organization and thus can be adjusted according to your needs.

In the following chapters you will get an overview on how to change the layout of the system and the relevant documents (or where to find the relevant chapters in the manual).

3.3.6. Adjustments in evasys Settings

You can adjust evasys to your organization in several points. Some text sent respectively shown by the system can (and partly should) be changed in the evasys Settings. You can find these on the left hand side in the main menu System Settings. Your changes are only active when you save them. For that purpose click [Save] at the bottom of the page. With [Undo] you can reconstitute the default settings.

The whole overview of the system settings is explained in detail in chapter D 2.5. “Evasys Settings: Configuration”. With the following selected settings you can adjust evasys to your organization:

- You can change the header of the login-screen (default is “Faculty Evaluation Feedback System”) in the evasys Settings (main menu “System Settings”). On the page “General” you will find the option “Title Login Window” to change this title.
- For denied access you can define a redirection address at “evasys settings/ network settings”, option “HTTP redirection address”. The default value is “http://www.evasys.de”.
- The so-called support link can be found at “System Information”/“evasys Website” and provides you a quick access to the webpage of evasys GmbH. If you wish to change the text of this option and/or the link, you can change them at “System Settings”/“evasys Settings” on the page “Network Settings”. There you will find the options “Display value support link” (default: evasys Website) and “HTTP link on support page” (default: http://www.evasys.de/support).

The following settings affect documents that are sent/handed out at different occasions:

- PDF report:

  The PDF report you get for your evaluation can of course be adjusted to your needs in different respects. The possibilities are described in detail in chapter B 4.7. “Instant Feedback: The PDF Report” .

- Letter of the PDF report

  You can automatically create a letter for the PDF report of your evaluation. There you can see a sender whom you can define in the menu “System Settings/Report Settings/Configuration”. There you will find the option “Sender part 1” to “Sender part 3” as well as “Sender above recipient address”.

- PSWD cards for online surveys

  For online surveys you (mostly) need a number of so-called PSWDs (transaction authorization code). A PSWD is a number-character-combination that serves as the unique identification and login for the students/participants.

  When generating an online survey a PDF file with the necessary number of PSWDs is created. The PDF contains the PSWDs as cards that can be cut out and distributed to the students/participants. On the cards you will find an explanation text that can be changed at “System Settings”/“evasys Settings”, page “Survey Online”. There you will find the option “Instruction text for PSWD cards”. The default text is “This PSWD allows you to participate in an online survey. Please use a web browser to open the following web address:”.

  PSWD documents can be generated in four different formats:

  - 3x8 PSWDs per page (A4)
  - 2x7 PSWDs per page (A4)
  - 3x7 PSWDs per page (A4)
  - 3x6 PSWDs per page (Letter)

  Additionally, a format can be selected that enables the PSWD to be applied to the PSWD card in the form of a scannable QR Code:

- 3x8 PSWDs per page (A4) with QR Code

The standard setting is the original format of 3x8 PSWDs (A4).

The format of the PSWD document can be selected in the configuration ("System Settings/evasys Settings/Survey Online/Format PSWD document").

- Cover Sheets:

  When conducting paper cover sheet surveys in addition to the questionnaire a cover sheet is generated. It serves for the unique identification of the survey in the scanning process. At "System Settings"/"evasys Settings", page "VividForms" the text of the VividForms cover sheet can be modified (default text: empty).

3.3.7. Adjustments in the Text Templates

(not Cloud Standard)

At any case you should check the text template that serve as templates for letters, emails and welcome texts at different occasions. Some of them should urgently be adjusted, some of them may be. For this purpose please see chapter D 2.1. "Text Templates" in this manual.

3.3.8. Adjustments in the Documents

You can add documents to the emails sent by the system. You will find additional information in chapter D 2.2. "Documents".

Hint:
For example you can send the evaluation regulations for your institution together with the PDF report.

In addition to this, the adjustment of the documents affects the layout of the letter that can be added to the evaluation report. The text of the letter is defined in the text templates, but the layout is defined by means of a PDF template with variable fields. The layout of the template can be adjusted freely and can thus e.g. correspond to your corporate design. (Nevertheless it is – of course – dependent of the content of the letter and the corresponding fields.) Please see chapter D 2.2.2. "PDF Templates" for more information about the layout of the PDF template.

3.3.9. Adapting the User Interface

If desired, you can individually adapt the color set of the complete evasys interface. A configuration menu is available under "System Settings/evasys Settings/Color Settings". You can either select from predefined colors schemes or adapt the different parts of the interface manually.

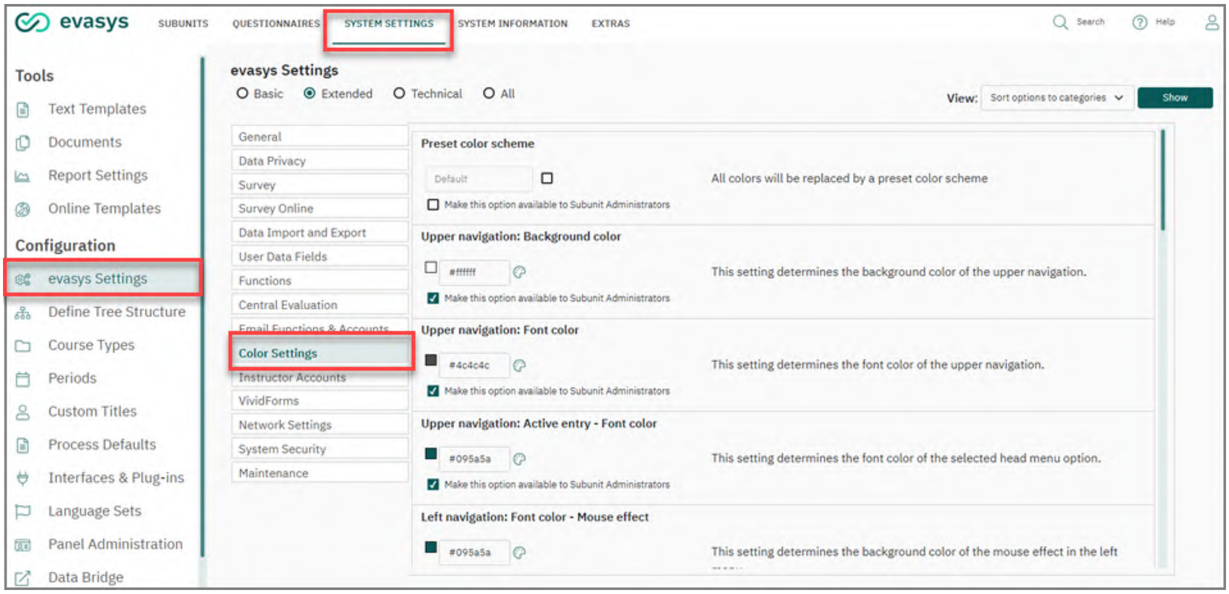


Figure 20: Color settings in the settings menu

3.4. Notes for Backups

(not Cloud Standard)

Before you begin to conduct surveys and collect data with evasys, it is imperative that your IT department sets up a back-up routine. evasys does not include a 'trash can'. Although any deleting process takes place in two steps and must be explicitly confirmed, once confirmed, the deleted forms or surveys are no longer retrievable.

Therefore, please ensure that your IT department backs up the database, if possible, on a daily basis. Lost data can only be reconstructed with a back-up. For detailed information about backups please refer to the Technical Guide.

B. Your Evaluation Process

Over the course of this chapter you will be acquainted with the actions and settings which are important for your evaluation work with evasys. This ranges from displaying the structure of your university or organization, to creating questionnaires and implementing and processing captured data.

Out of our experience a five-step phase model has evolved that follows in chapter B and so will be introduced to you first. This way you can get your bearings within the chapter and find relevant paragraphs fast.

1. Your Workflow in the Process of Evaluation

This chapter first offers a brief overview of the phase model, before the respective phases are discussed in detail. The following five stations show the implementation of survey periods in accordance with the procedure of central evaluation:

- Phase 1: Preparation of a Survey Period
- Phase 2: Implementation of Surveys
- Phase 3: Capture and Instant Feedback
- Phase 4: Advanced Reporting
- Phase 5: Quality Management

The single phases comprise of the following steps:

Phase 1: Preparation

- Create the organizational structure (subunits, instructors, courses) OR
- Create subunits and import instructors/courses (CSV import) OR
- Import subunits, instructors and courses (XML import)
- Integrate the questionnaires
- (possible setting of additional report definitions)
- (possible definition of norms and/or quality guidelines)
- Generate survey procedures
- Integrate individual questions (Instructor’s Operational Questions) through feedback loop to the instructor

Phase 2: Implementation

- Mass production of individualized questionnaires (for hard copy procedure)
- Download cover sheets and dispatch envelopes containing pre-produced questionnaires to instructors (for cover sheet procedure)
- Generate and dispatch PSWDs (for online surveys)
- Produce individualized questionnaires and/or dispatch PSWDs (for hybrid surveys)

- Implementation of surveys and return of responses to the capture location (all procedures simultaneously)

Phase 3: Capture and Instant Feedback

- Capture of questionnaires (all procedures simultaneously)
- Reminder function for online survey participants
- Manual anonymization of handwritten comments (if required)
- Automated delivery of report documents by email or internal mail

OR

- Download of the report documents by the instructor

Phase 4: Advanced Reports

- Create summary reports
- Filter and combine reports
- Mass dispatch of comparative profile lines
- Compare various questionnaire versions
- Export raw data to Excel, SPSS or Sphinx
- Archive raw data

Phase 5: Quality Management

- (possibly definition of norms and/or quality guidelines)
- Enable QM Screens, giving deans an insight into the evaluation results of a department
- Generate new norm values for the following evaluation period

Some steps need to be performed only once – or at least very rarely (for example creating questionnaires); others must be performed for each period (for example the creation and implementation of surveys). Some steps may not (yet) be relevant to you, for example the creation of norms for which you should already possess evaluation data. Other steps are necessary in each evaluation (such as, again, the creation and implementation of surveys)

To give you an overview of how evasys can support you in your evaluation, the individual phases are accurately outlined in the following. This way you can best decide which elements you wish to use and how you design them.

2. Phase 1: Preparation of a Survey Period

- Setting up the Organizational Structure
- Import Interfaces
- Creating and Administrating Questionnaires

2.1. Setting up the Organizational Structure

The organizational structure in evasys consists of three levels which are arranged hierarchically:

- Setting up the Subunits
- Generating and Managing User Accounts
- Creating Courses

With the help of the course settings further intermediate levels can be inserted such as, for example, the program of study. These further levels can later be used for filtering purposes.

By dividing the system into subunits a clearly arranged survey administration can be established and workload can be shared. Each subunit can be administrated by one or more subunit administrators, so that work within the system can be distributed to more than one person.

On user level the role of the instructor is of special importance, as only instructors can be assigned courses. Without having created an instructor, no course can be created nor surveyed.

To conduct a survey, the system always has to be built up to the third level, the course level. By choosing a questionnaire as well as an evaluation period, the survey for a course can be created.

The following figure shows an example of an organizational structure for a university:

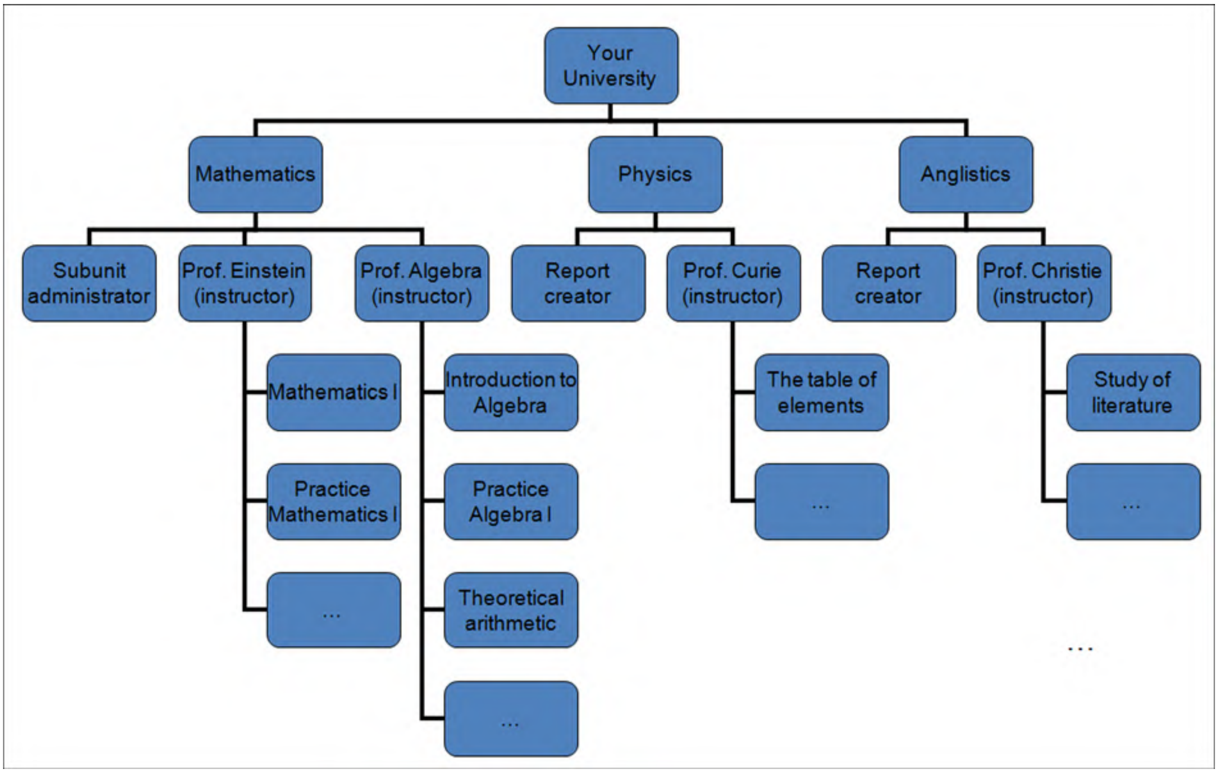


Figure 21: Example of an organizational structure of a university

The functions for creating the organizational structure within evasys can be found in the menu “Subunits”. Here the single levels can be created or imported and their contents can be managed. Furthermore you will also have access to the survey management.

This view is available to the administrator as well as to the subunit administrator. The subunit administrator can use all the functions described in the following sections except for setting up subunits.

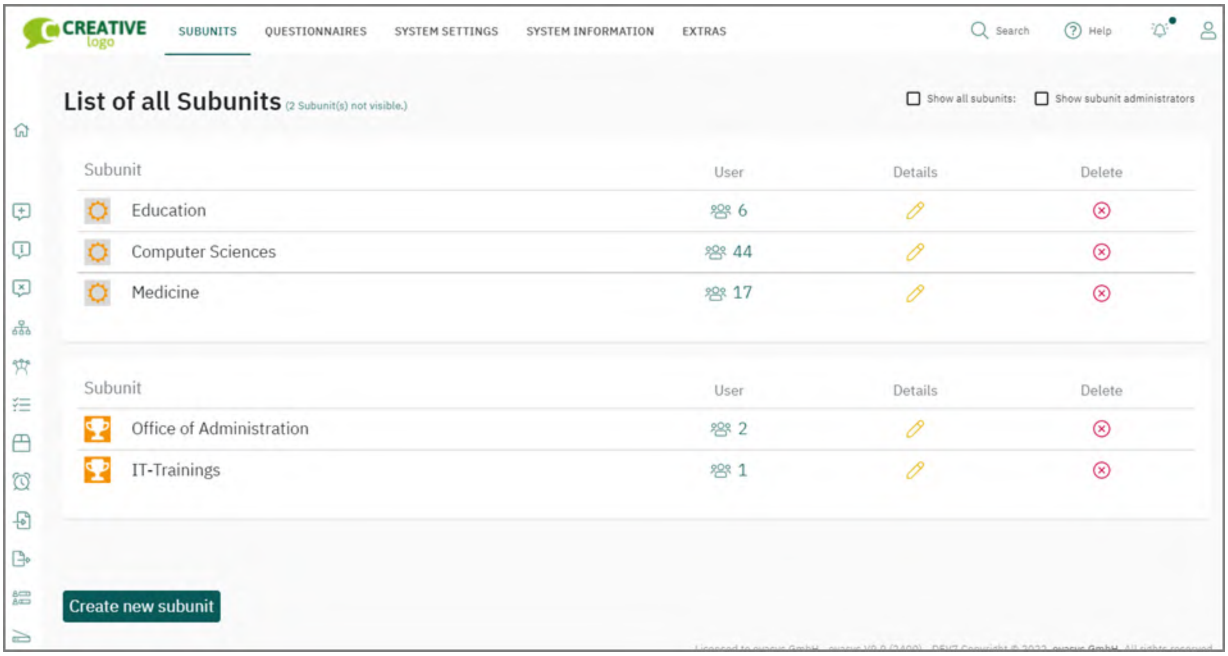


Figure 22: Menu “Subunits”

2.1.1. Setting up the Subunits

Choose a reasonable number of subunits. These subunits can either be departments or other teaching units.

Create new Subunit

(not Cloud Standard)

In order to set up a new subunit, click on the button [Create New Subunit] in the window “subunits”. This is where the name of the subunit as well as subunit address and contact information goes. The address data is used in the summary report letter and appears in the system info (“System Information”).

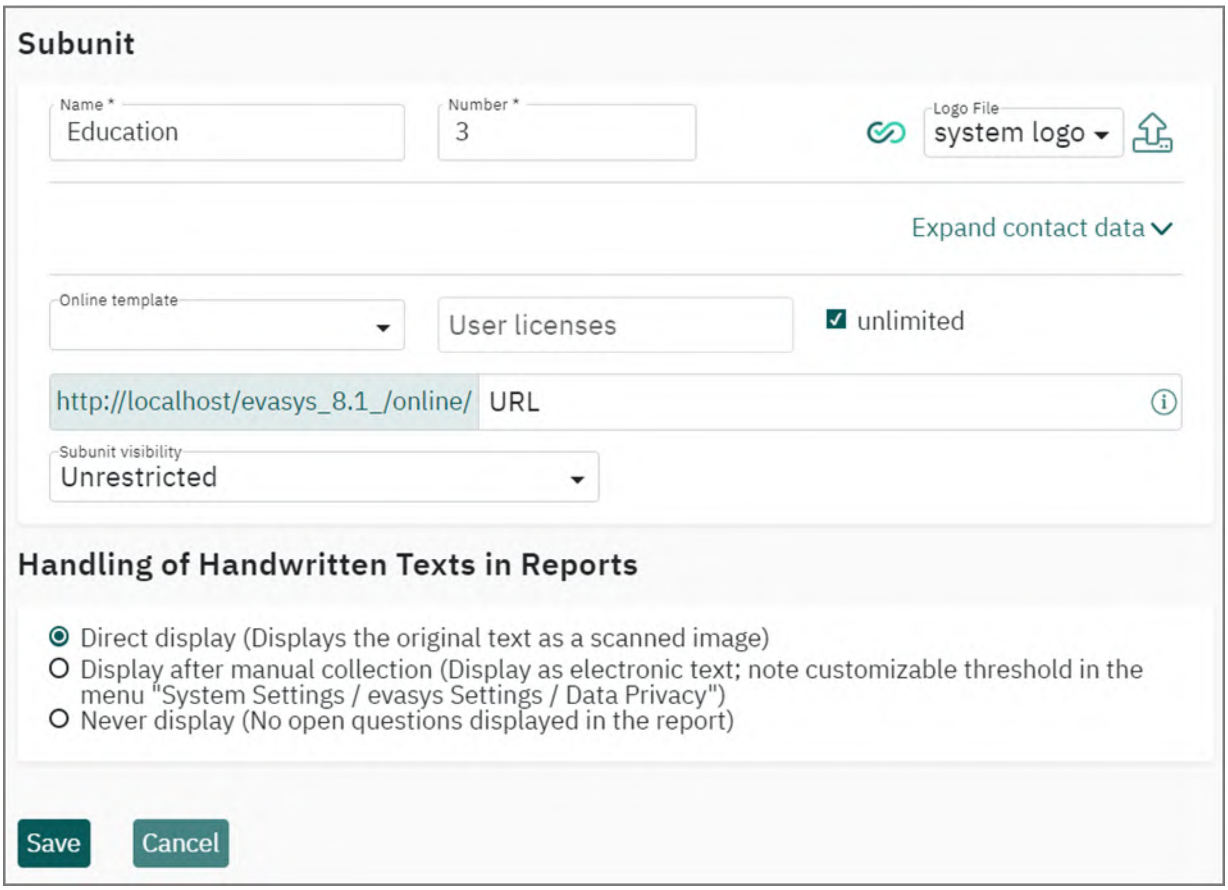


Figure 23: Create Subunit

The Subunit number is automatically incremented. It can be adjusted if necessary. By default, subunits are sorted alphabetically by the subunit name in the system. If you have very many subunits in the system or generally would like a different arrangement, we recommend using the subunit numbers for the list. For this, activate the option “Use Department No. for ordering the subunit lists” at “System Settings/evasys Settings/Functions/General”

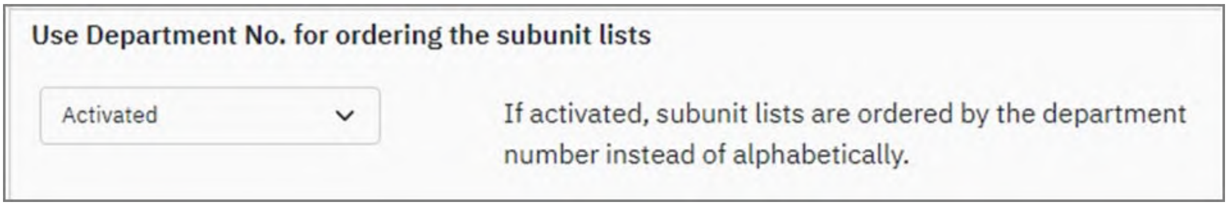


Figure 24: Using department number for sorting the lists

You can use subunit numbers in 100 and 1000 steps to structure the subunit list. After every 100 step, a new heading line is added for visual structuring (compare below Figure 25); additionally, after every 1000 step, the distances between the 1000 areas are also enlarged.

Note:
Please note that changing the sorting arrangement also affects all selection lists that display subunits.

If desired, a separate online template can be defined for each subunit, which defines the presentation of an online survey for the subunit. You can also define an individual suffix for the server address so that the system can differentiate which template is used for the online survey. For more information, please see chapter B 3.15.2. “Customization of the Used Layouts”.

The visibility of a subunit can be limited, for example, to hide subunits containing only old survey data, which should, however, remain in the system. Thereby the clarity of the system can be increased.

In the area “Subunit visibility” there is a choice of different display options: Hidden, Unrestricted, (Subunit) Administrator only, Report creator only. You can also determine whether the subunit – regardless of the status – should be displayed using the context menu on the left.

If a subunit is set as invisible it is also hidden in the subunit overview. Via the option “Show all subunits”, it can, if desired, be displayed.

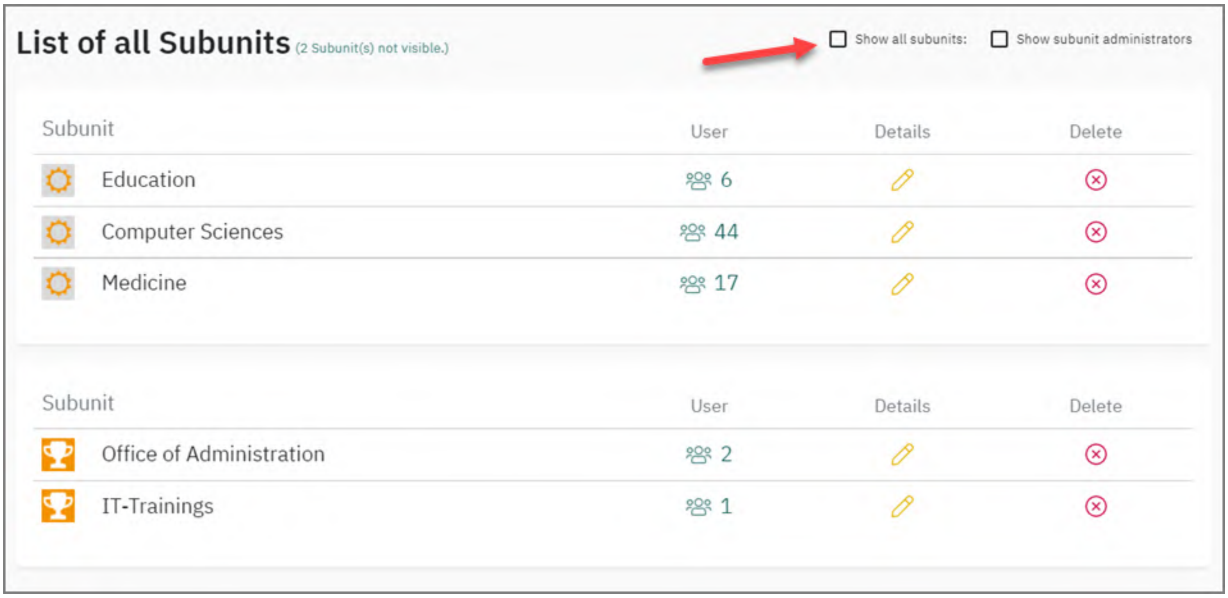


Figure 25: Hide Subunit

In the case of instructor account licenses, by using the option “Assign user licenses”, the number of available licenses can be limited for each subunit. For more information, please see chapter D 1.7.4. “Administration of User Accounts”.

Handling Handwritten Texts

Further information at “Handling handwritten texts” gives a comprehensive subunit rule for the handling of handwritten responses to open questions:

- Direct display (default setting):

  Handwritten responses to open questions are shown as an image box (graphic file) in the PDF/HTML analysis. This option guarantees that after collection of the data the instructor gets complete feedback, including responses to open questions.

- Display after manual collection:

  In order to preserve anonymity handwritten responses to open questions are not displayed. The report recipient can only access the results to the closed questions (decentral) or will be sent these (Central Evaluation).

  With the user type “data entry assistant” (Section 5.2.3) a sequential, manual entry of the handwritten comments can be accomplished. Multiple selections are counted, sorted and displayed according to their frequency. The effort put into this work allows these texts to be transmitted (Central Evaluation) in statistics programs, which then can carry out a lexical analysis. After all image boxes have been entered, the instructor receives a message that s/he can now view the responses to the open questions.

  In order to minimize unnecessary costs, a threshold value can be defined (System Settings/evasys Settings/Surveys). This anonymization threshold sets a minimum number of returns under which survey responses are anonymized (can be set from 1 to 99).

- Never display:

  When this option is activated, the handprinted fields will not appear in either the HTML or PDF reports. This option is only recommended for blocking access.

Using Logo Files

You can link a graphic file with a subunit. This graphic is displayed in the evasys user interface, in the PDF report header and in the questionnaire header of hard copy surveys of the assigned subunit.

You need 60x60 px version of the logo in jpg, png or gif format. If desired, the logo can have a transparent background.

Note:
Please note, that the logo is only displayed in the correct size if you adhere to the defined resolution of 72 dpi. It therefore might be necessary to use an image editing program to prepare the logo.

Figure 26: Logo Selection

In the window of the subunit details you can select a logo in a drop-down menu from the logos available in the system. If the logo you would like is not yet in the system, then you can add it by clicking on the green “Manage logos“ icon.

In the window that appears select a logo file with a click on [Browse] and enter it into the system with [Upload].

Figure 27: Manage Logo Files

In the table in the window you can see all the logos in the system. You can use the pencil symbol to change the name or the cross symbol to delete the logo from the system. In the first column you can select a logo as default logo, and it will be automatically used whenever a new subunit is set up. Click [Save] to apply your settings. Click on [Back] to get back to the subunit details.

Figure 28: Define Default Logo

The logo graphic will be displayed in the interface as an illustration of the active subunit. Even when the instructor logs in with an active user account this logo will appear in the upper right hand corner of the screen. In addition the logo will appear in the heading of the PDF report document generated by evasys.

We recommend using the JPG format even though GIF is better as a rule for depicting logos. The reason is that for legal reasons relating to licenses some printer drivers cannot encrypt the compression of the GIF format. In this case, the reports could not be printed.

Changing Subunit Data

After a mouse click on the pencil symbol in column “Details” of the subunit window, you can work with the address and configuration data of the subunit.

Delete Subunit

You can delete a subunit by clicking the red cross icon in the column “Delete”. Only users of the type administrator or secondary administrator can delete subunits. For security reasons, subunit administrators do not have this option.

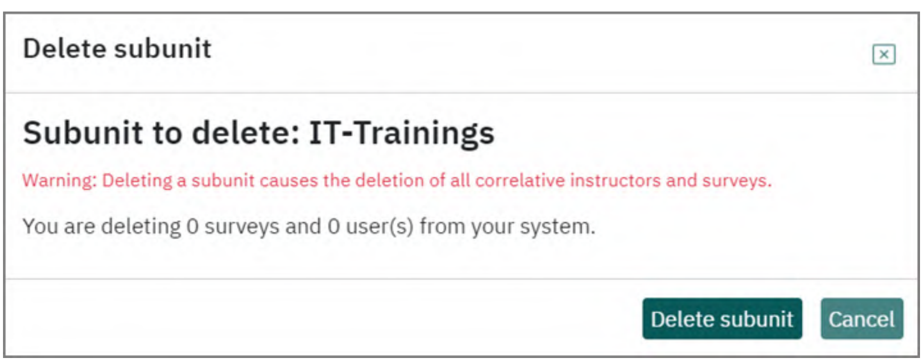


Figure 29: Delete subunit

Note:
Take extreme care when using this function. Deleting a whole subunit has far-reaching consequences.

ALL existing profiles of instructors in this department TOGETHER with their folder and the surveys contained in them will be irrevocably deleted. Before deletion we strongly urge you making a copy of such valuable survey data by having the individual instructor make a copy of the PDF report files or the raw data on their own hard drive.

2.1.2. Generating and Managing User Accounts

User accounts can be set up by administrators and subunit administrators. It is important to distinguish between active and passive users. Active users require login information to work with evasys which are created when the user is created or in subsequent editing of the user profile.

After log-in, each active user can change his user name and password in his user profile.

The administrator as well as subunit administrators can take on additional roles in their user accounts, which means, from their account they can perform other functions such as report creator, data entry assistant or verifier, without having to log in as a separate user. The additional roles are assigned by the administrator and can only be adjusted by him. After logging in, the administrator or subunit administrator can switch between user roles via a drop-down menu in the upper left corner of the screen.

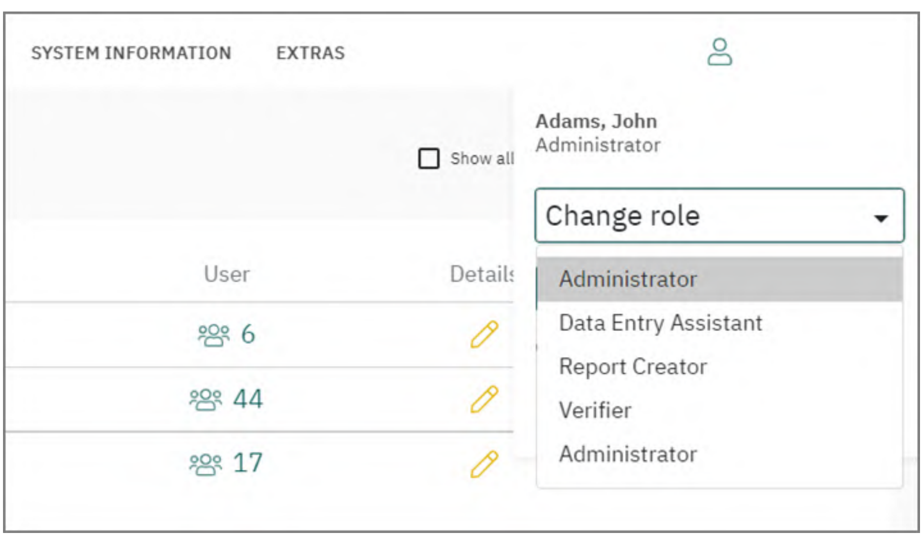


Figure 30: Switching between User Roles

The evasys User Types

Administrator

(not Cloud Standard)

The administrator manages the complete system and sets up user accounts, questionnaires as well as the configuration. In the central evaluation procedure the administrator manages all surveys as well as their reports.

Subunit Administrator

The subunit administrator has a user account that allow the administration of all of the activities in the subunit.

Within a subunit the subunit administrator can set up user accounts, create questionnaires, start surveys and send reports.

One or more subunit administrators can be created per subunit. Where necessary, additional subunits can be assigned to their administration, which means they can administer subunits outside of the subunit in which they were created. With this, the following is to be observed: Subunit administrators created within a subunit are considered as a group. Therefore they can only administer the same subunits. If, for example, a subunit is detracted from a subunit administrator, it is automatically detracted from all other subunit administrators of this group.

Similar to the administrator, the subunit administrator can take on additional roles in his user account (report creator, data entry assistant and verifier).

The administrator can revoke the subunit administrator's right to add questions to the public question library.

It is also possible to deny the subunit administrator the right to use his own questions in the questionnaire editor. This allows to force the use of the public question library.

The configuration options available to the subunit administrators are defined by the administrator under “System Settings/evasys Settings”. Here, specific setting options are marked “Make this option available to Subunit Administrators”.

In doing so the subunit administrator is able to change certain configuration options, by which overwriting his subunit’s settings as defined by the administrator.

Instructors

- Central evaluation mode

  When using the central evaluation mode instructor accounts are set at passive. This shows the organization structure and courses which have surveys registered to them and reports. The email addresses given in the profile receive PDF reports as well as other emails. As long as the instructor account is set at passive it can only be used indirectly by the administrator.

- Activated instructor account mode

  When the instructor account is activated then it can be accessed by its owner with a user name and password. It can now be used for the creation of individual questionnaires and surveys, while at the same time the general evaluation is carried out by the administrator.

Instructor accounts should be activated when internal clients need a tool for carrying out a number of surveys, e.g. an instructor, the library or the administration.

Dean

- Decentral system mode

  The only difference between the user type Dean and the user type Instructor is that for the Dean a complete user statistic for the relevant subunit is created.

- Central evaluation mode

  In Central Evaluation the dean can be labeled as active or passive. An active dean, similarly to an active instructor, can create questions, form questionnaires and, for example, access the activated QM views (stage 5).

  A passive dean has access only to his personally activated QM views.

Dean of Studies

This user type is only available for the server version “Central Evaluation”. The user of this profile can make a selection from a list of evaluated courses and have them summarized in a special report. The dean of studies does not count as a user license.

Data Entry Assistant

This user type is important when handwritten responses by respondents are not to appear in the report document. The data entry assistant can access the responses to open questions as sorted according to survey and enter them in plain text. After a survey has been processed you will have a completely anonymized analysis available. In order for this user type to be able to work, you must under the properties of this subunit in “Handling handwritten text” set the option “Show after manual collection”. A user license is not necessary for the data entry assistant.

You can define individual access rights for each data entry assistant:

- own subunit – data entry assistant has only access to handwritten comments of all surveys proceeded in his own subunit;
- multiple subunits – data entry assistant has access to handwritten comments of all surveys proceeded in the selected subunits (Multiple selections of subunits can be made by pressing and holding down the “Ctrl” key.);
- system level – data entry assistant has access to handwritten comments of all surveys processed in evasys.

As an Administrator, you set this value when creating the relevant user account. As soon as you create a data entry assistant, a particular setting in the user rights (step three of three) allows you to define the data entry assistant as system-wide (system level), subunit groups (own subunit and selection of further subunits) or only subunit-wide (own subunit):

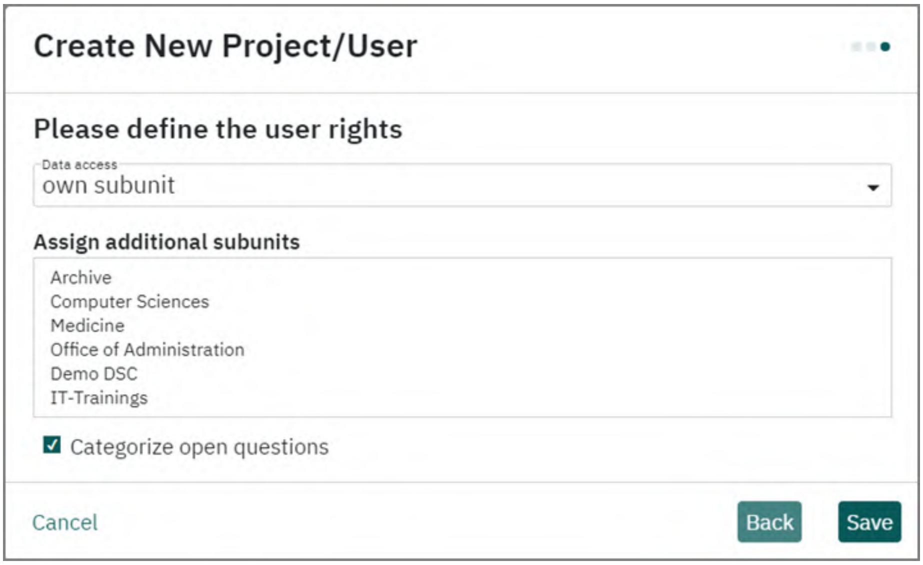


Figure 31: Creating/Editing the User Rights of a Data Entry Assistant

Verifier

The Verifier can be used as a visual correction for scanned sheets.

The Verifier controls the VividForms sheets processed by the VividForms reader, and can, where necessary, correct the recognition attributes. The verification can be activated or deactivated for surveys.

This can be necessary because ambiguously filled out sheets cannot always be correctly machine read.

Report Creator

A user profile is created with report generation rights. This allows the generation of anonymized summary reports on subunits. Further report forms are available when using the server version “Central Evaluation”. The user account of a report creator does need a user license.

The Administrator Account

The administrator account is used to create the system-wide organizational structure, administrate users and integrate questionnaires, as well as regulate and supervise processing. In addition to this, surveys can be generated, displayed and evaluated and raw data exported.

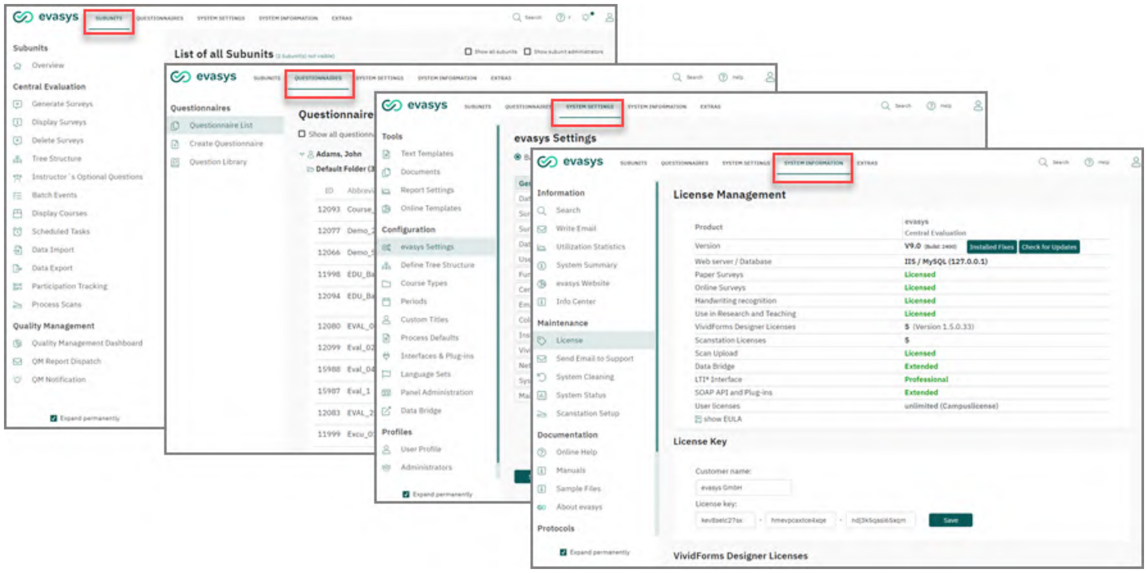


Figure 32: Administrator Account

The data fields of the administrator profile can be edited in “System Settings/User Profile”. Here, the personal data of the administrator, such as salutation, title, etc. can be set. The email address is particularly important because evasys users send their inquiries by email to the administrator. In addition, the administrator can change his login name and password and, if desired, take on additional user roles.

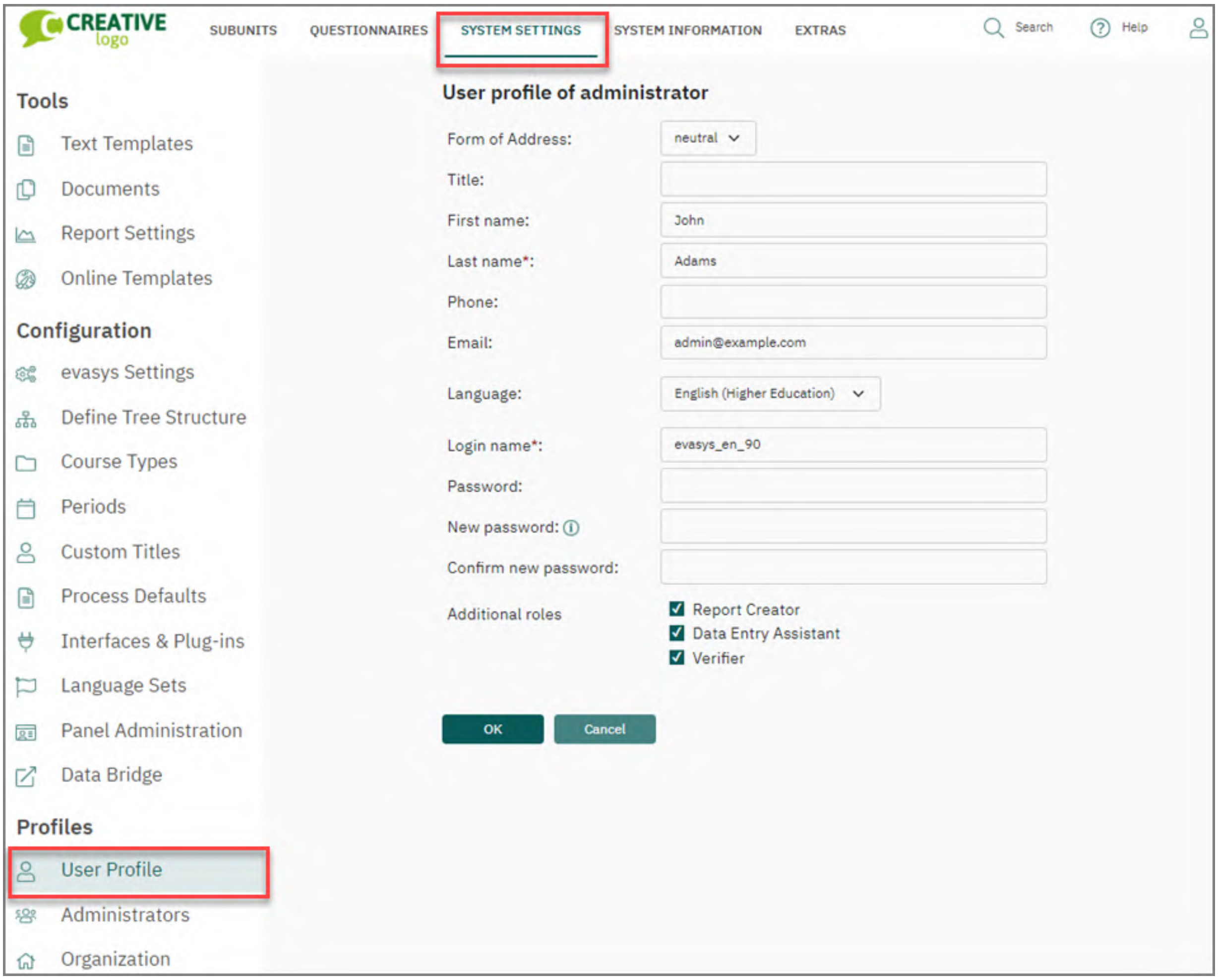


Figure 33: Administrator Profile

When entering a new password, the security level of the password is checked and displayed in the interface. A secure password consists in at least 8 characters and contains upper and lower case letters as well as numbers and does not contain consecutive identical characters.

Figure 34: Security level of a password

By default, the system only offers recommendations for secure passwords. If desired, a secure password can be made obligatory. To do this, activate the option “Enforce password security” in the menu “System Settings/evasysSettings/System Security”.

All changes of the user profile must be confirmed by entering the old password. The entries are applied by clicking on the [OK] button.

With the aid of additional roles, the administrator can, from his own user account, take on tasks such as data entry, verification or creating reports, without having to log into the system as a new user. Later, the administrator can switch between the different user roles via a drop-down menu in the top left corner of the screen.

The administrator can, where necessary, define further secondary administrators, for example, to have a substitute administrator in the system. Both the administrator and secondary administrators have administrative rights for the entire system and can access all subunits.

For the creation and management of secondary administrators, go to the menu “Administrators” in the main menu “System Settings/Profiles”. A click on the menu item opens the administrator management. A summary table displays all existing secondary administrators. The first column shows the name and, in parentheses, the additional roles of the secondary administrator. The second column shows the number of reports generated by the report creator role. The administrator can customize the user settings in the column “Details”. By use of the red cross in the column “Delete”, a user can be removed completely.

Note:
Only the main administrator can create and edit secondary administrators. However, secondary administrators can edit their own user data via the menu “System Settings/User Profile”.

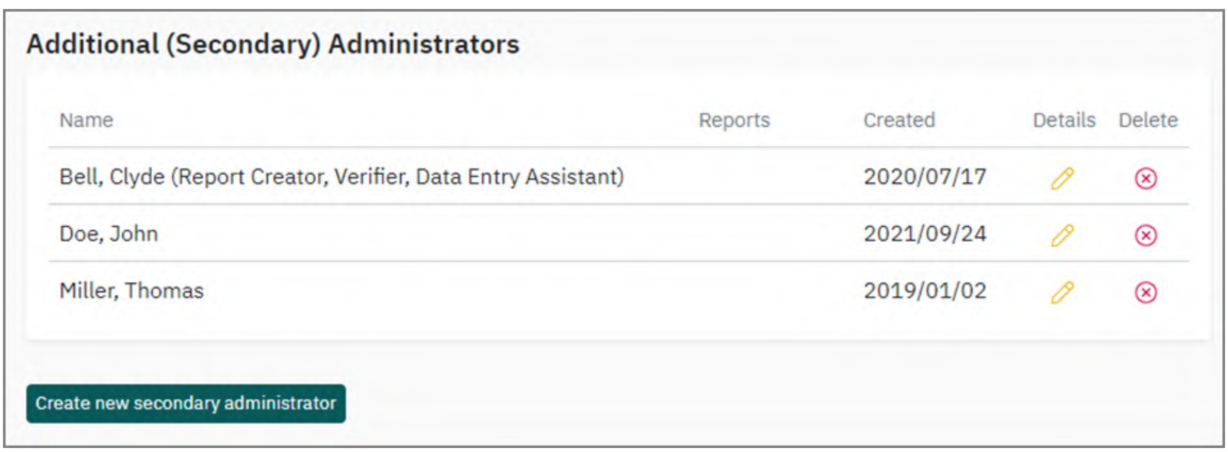


Figure 35: Management of Secondary Administrators

To create a secondary administrator, click on the button [Create new secondary administrator]. A three step wizard opens facilitating the creation of a user.

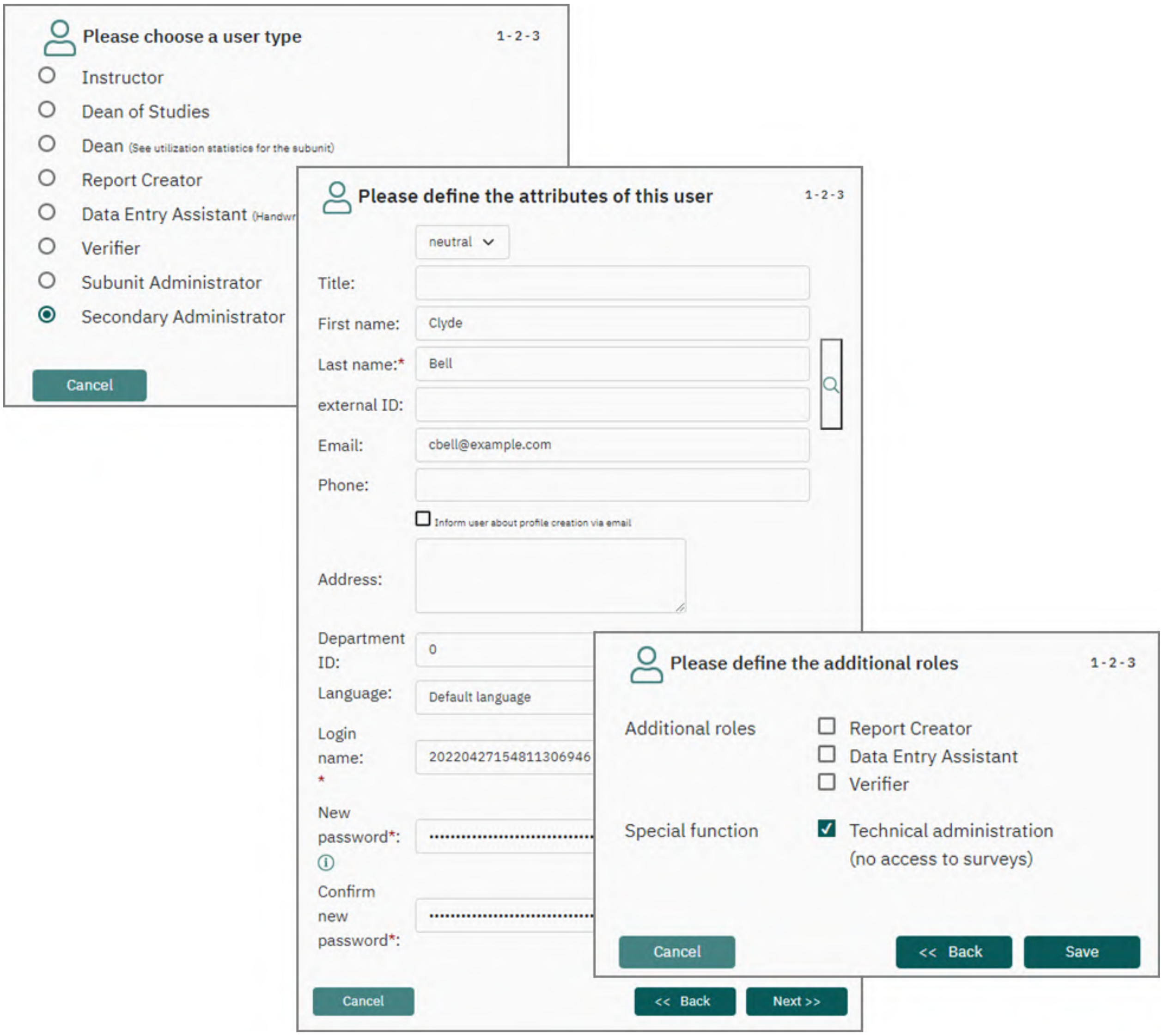


Figure 36: Creating Secondary Administrators

In the first step, the user type “Secondary Administrator” is already selected. Click on [Next] to input the user data (the most important being name, email address, login name and password). In the third step, the user can, where necessary, be assigned additional roles. After clicking on [Save], the user is created and appears in the list of secondary administrators.

If the special function „Technical administration“ is activated, the secondary administrator is allowed to have access to technical areas of the software, however not to survey data. This is particularly useful if a person from the IT department only needs access to functions such as license management or the evasys configuration. The two main menus “Subunits“ and “Questionnaires“ are hidden completely. The main menus "System Settings" and "System Information" display only the contents relevant for the IT personnel.

Figure 37: Menu for Secondary Administrators with technical Administration

Setting up a User Account manually

Users always belong to a subunit. Go to the corresponding subunit to find the functions for adding new users.

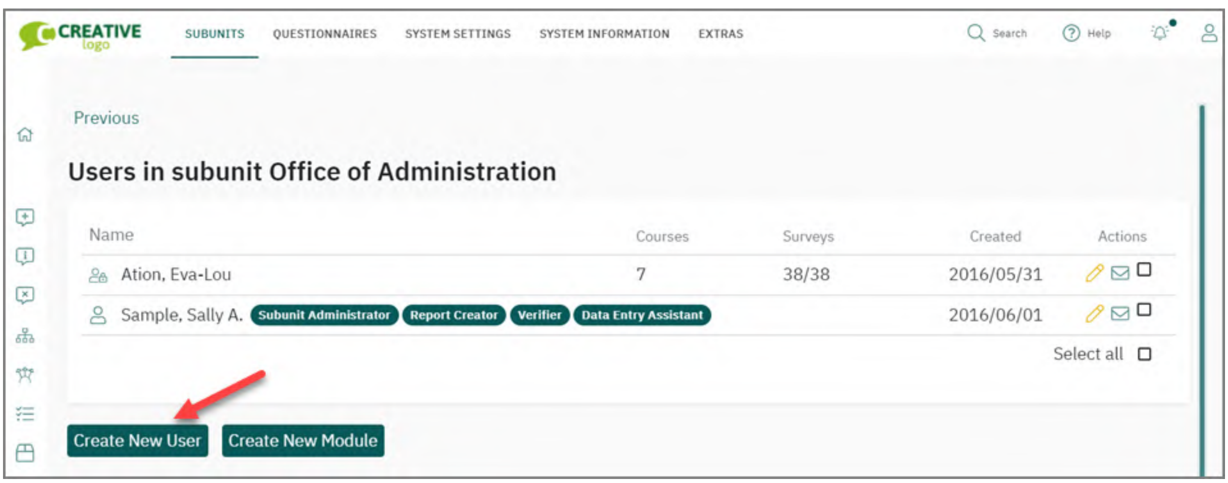


Figure 38: Manually Creating User Accounts

By clicking on the name of a subunit, you reach the list of users. All existing users are listed here. New users can be added via the [Create New User] button.

A wizard opens facilitating the creation of a user account. In the first step, the user type is defined. The following user types are available:

- Instructor
- Dean of Studies
- Dean
- Report Creator
- Data Entry Assistant
- Verifier
- Subunit Administrator
- Secondary Administrator

In the third and fourth step, the user data is deposited as well as the user rights being defined. The most important details are shown in the table below:

Column	Content
Title 1	Mr., Mrs., Ms or neutral
Title 2	Max 50 characters (optional field) In the report document the combination Title2+Surname will appear
First Name	Max 50 characters (optional field)
Last Name	Max 50 characters (non-optional field)
External ID	Max. 64 Characters (optional text box) The External ID is used to classify the user within the system as a whole, so that only one license is used per user. See below for more information. This field only appears if External Ideas are enabled in the System Settings.
Email	Max 100 characters (optional field) evasys sends all messages to the user at this email address, e.g. PDF reports for processed questionnaires.
Phone	Max 100 characters (optional field)
Address	User defined, three lines recommended (optional field) * This field is used as the internal email address in the Central Evaluation server version – Self registering version and has no function when the standard user profile (decentral) or the Standard version is used.
Profile Image	Profile images for instructors (optional field, ~50kb, JPG/PNG)
Department ID	Max 6 numerical characters * This field is used for the subunit classification in the Central Evaluation server version – self registering procedure and has no function for the standard user profiles (decentral) or the Standard procedure.
Language	Define system language for the user
Login name	Max 50 characters (non-optional field) * This entry must be distinct within the system, that is, log in names can only be assigned once!
New Password	Max 50 characters (non-optional field)
Confirm new Password	Max 50 characters (non-optional field)
QM Views	No QM views | Only own surveys | Only own subunit| Full authorization

Additional Subunits	Additional subunits can be added to QM views. (QM views has to be set to “Only own subunit”)
Questionnaires	Unrestricted | Templates only | No access to questionnaire creation

Table 4: Necessary Information for a new User Account

The following figure shows creation of an instructor account:

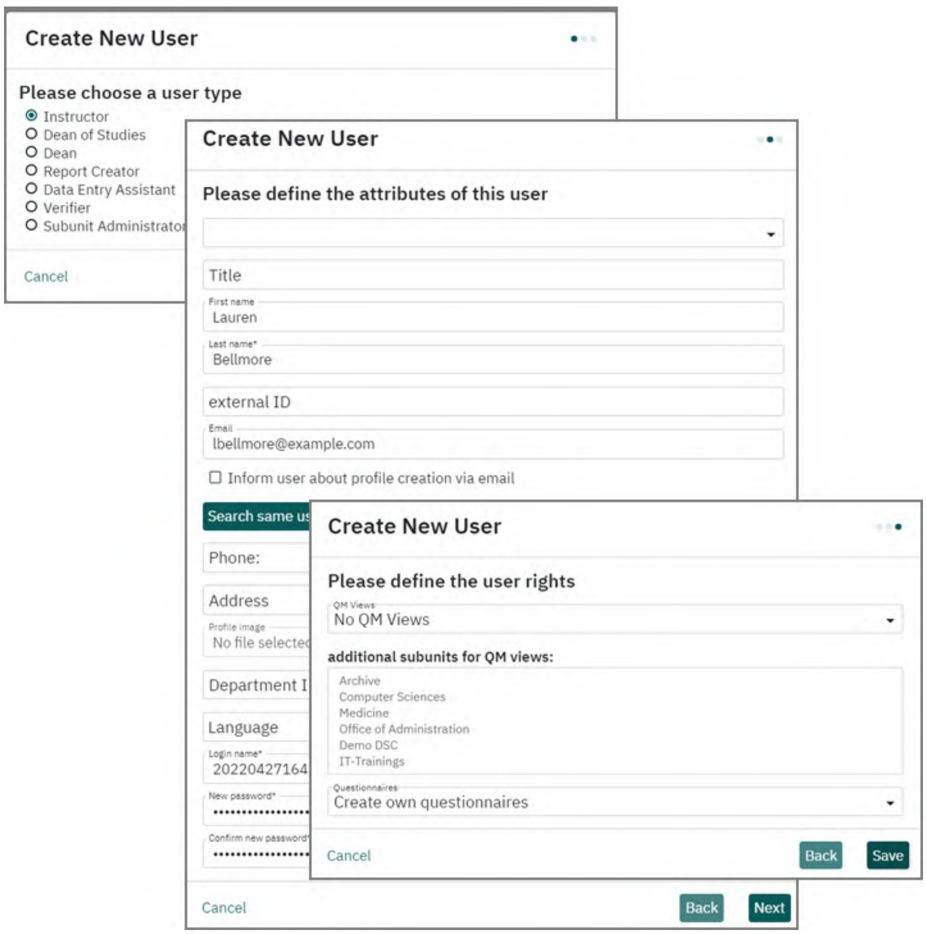


Figure 39: Creating an Instructor Account (three Steps)

As soon as a new user is created it appears in the user list of the subunit. The users are ordered alphabetically according to the last names. By default the format for user names is “Title, first name, last name”. If so desired, in the System Settings under “System Settings/evasys Settings/Functions/ Display of User Names in the Subunit Overview” an alternative display can be selected, for example: Last name, first name, title.

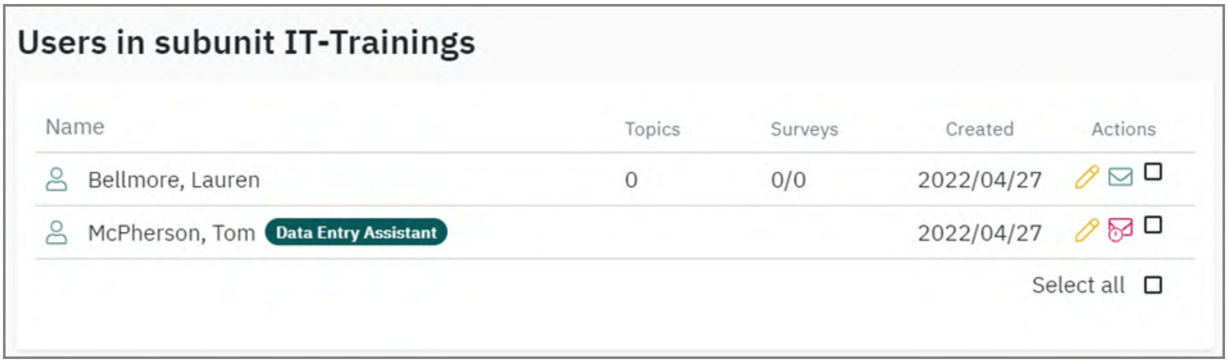


Figure 40: User in the User List

Using External IDs

If an instructor wishes to work in different subunits, they must have their own instructor account for each subunit. As far as the system is concerned, each account is a separate user, each one of which is assigned their own separate license. External IDs allow you to connect these user accounts to one another, so that they can all run on the same license. This is particularly important if you have purchased a license which restricts the number of user accounts available to you. It is very useful to link user accounts with the help of external IDs if your instructors are allowed to log into evasys themselves in order to view their PDF reports (active or passive access). In this case, the user will only need one login to view the reports of their surveys, even if they are stored in different subunits.

External IDs are optional. You can enable and disable their use under “System Settings/evasys Settings/Functions/Display External ID.” This function is activated by default.

The function name “External ID” can be exchanged for a different name if so desired. To do this, change the name of the function under “System Settings/evasys Settings/Functions/Name for external IDs” to the desired name, e.g. “Personnel Number” (or similar).

The following user attributes must match if user accounts in separate subunits are to be recognized as belonging to the same user: Last name, first name, email address, and external ID. The text box entries in question may not be empty. The program does not differentiate between upper and lower case letters.

If a user account is to be created in a subunit, and that user account already exists in another subunit, then one or more of the attributes named above, for example the last name, can be entered into the user dialog. You can then simply click on the search button, and the system will automatically search for an identical user with the same last name. A window opens and displays all possible matches. Click on the green arrow to select which user's information to use. The new user account created this way does not use an additional system license. Only one license is deducted, the one used when the initial account was created. You can view the number of licenses currently in use under “System Information/License Management” (see also chapter D 1.7.4. "Administration of User Accounts").

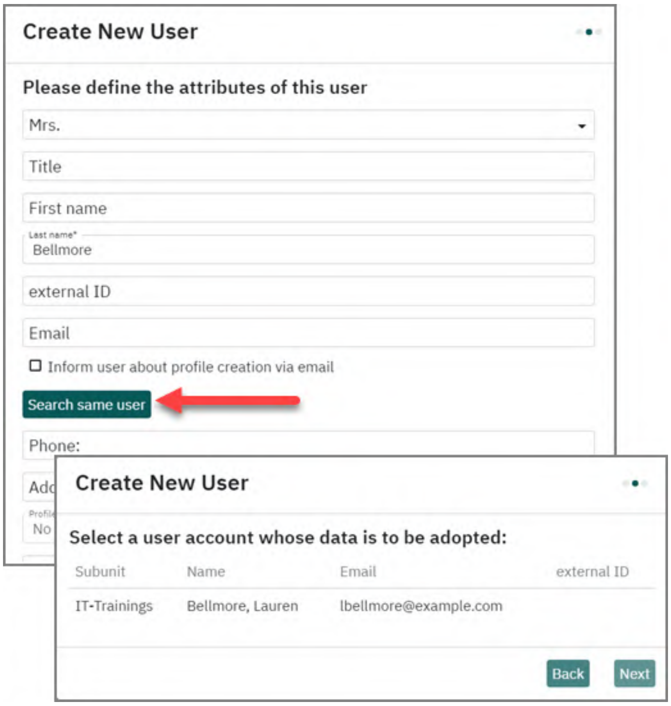


Figure 41: Creating an Instructor's Account - Searching for Matching Users

2.1.3. Login with the External ID

In evasys the External ID of the user can be used instead of the login name to log in to the system. To do this, it is necessary to activate and use the external ID in evasys for the user accounts as subunit or (secondary) administrator under "System Settings/ evasys Settings/Functions (All)/Display external ID". If this requirement is met, the login with the external ID can be activated as (secondary) administrator under "System Settings/evasysSettings/Functions (Technical)/Login using external ID".

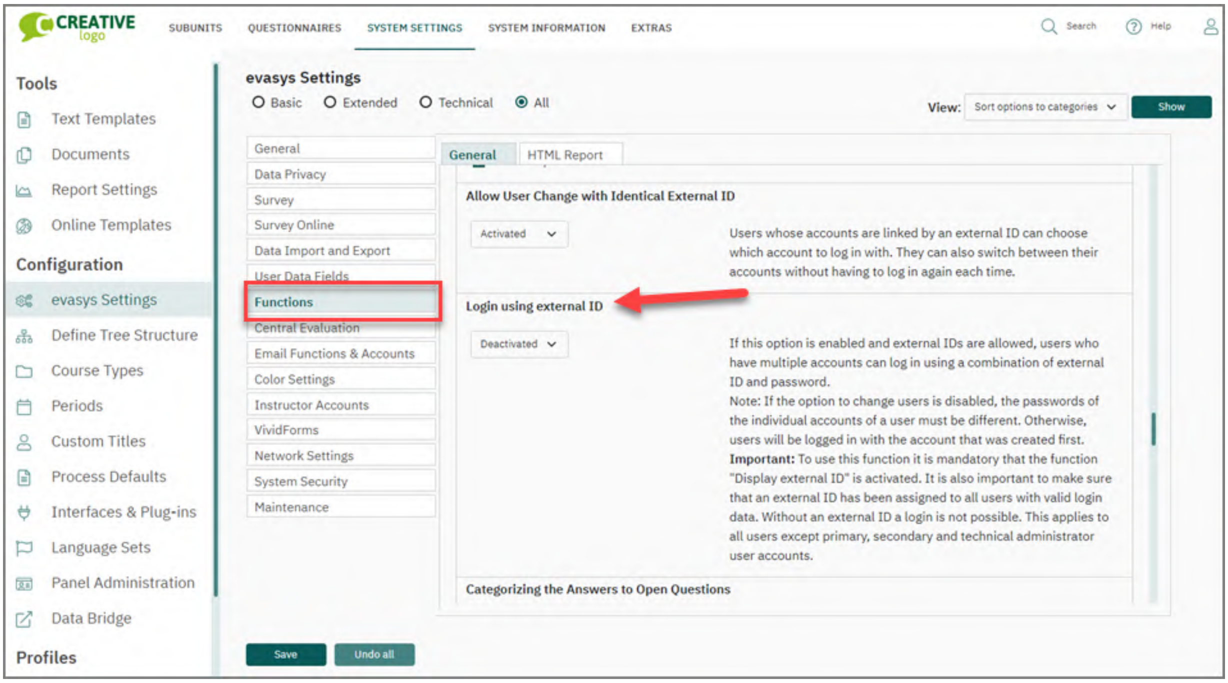


Figure 42: Activate log-in with external ID

Users can then log in using the external ID instead of using the login name. Therefore, it is no longer necessary nor possible to assign a login name for users or to change it.

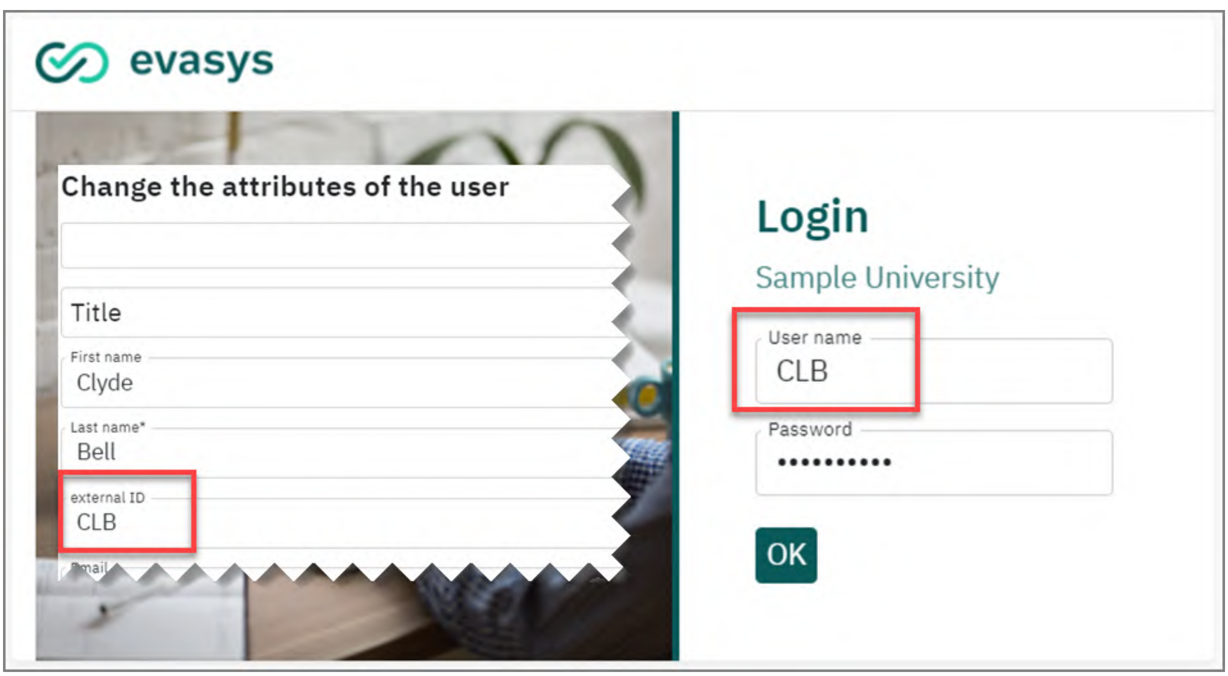


Figure 43: Log-in with the external ID

Login with the external ID is available for all user roles in the system, including subunit and secondary administrators. Only the main administrator is excluded from this login variant.

Note:
Users can potentially be "locked out" of evasys if the login is done with the external ID and individual users do not (yet) have an external ID in their profile!

Note:
The administrator does not have an external ID and therefore continues to log in with his login name as long as no alternative login procedure such as LDAP or Single Sign-on is used.

The administrator can still change his login name and password.

Login with the external ID can be combined with Single Sign-on. Please refer to the evasys Technical Guide for more information.

Use Profile images

In order to provide user accounts with a recognizable image, which, for example, allows users to easily recognize instructors, you can assign a profile image to evasys accounts. You must activate this option in the Menu “System Settings/evasys Settings/Functions” before you are able to assign an image to a user account.

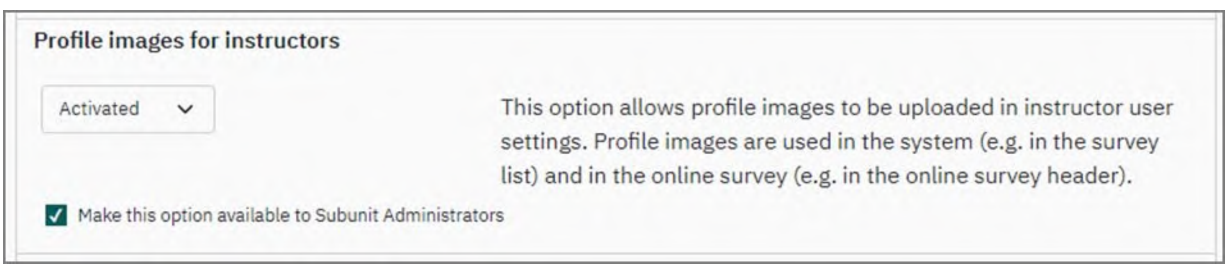


Figure 44: Activate Profile Images for Instructors

Note:
Please consider that under some circumstances it might be necessary to obtain the consent of the relevant persons in charge before using their photographs, drawings, caricatures or photo-montages.

Once this setting has been activated within the system, you can select and upload an image for the instructor profile using the “Browse” button. Please note that the image format must be JPG or PNG, and the file size must be approximately 50 kBytes. It makes sense to use a passport photo for this purpose, so that the instructor is easy to identify. The profile image can be changed or re-uploaded if desired. The profile image can also be deleted at any time using the button “Delete profile image”, which is marked with a red cross.

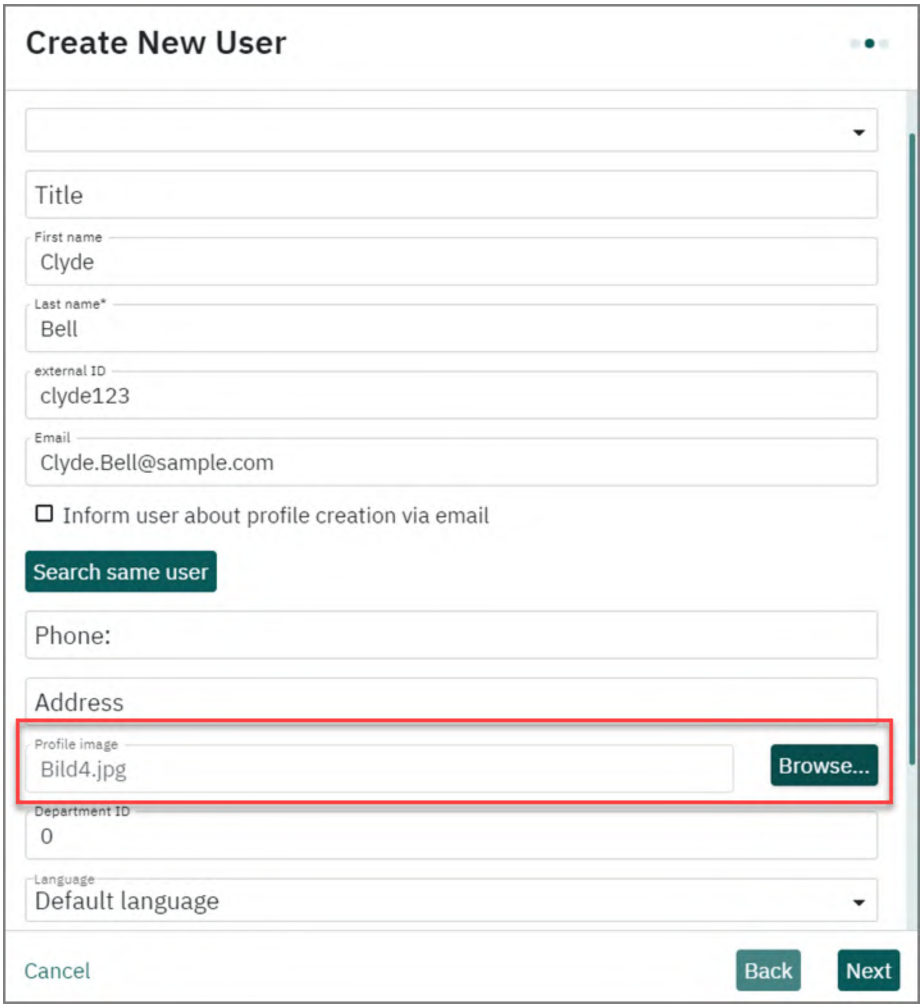


Figure 45: Saving profile images

Instructor's profile images are saved at various points throughout the system. For example, you can view the profile image in the subunit preview.

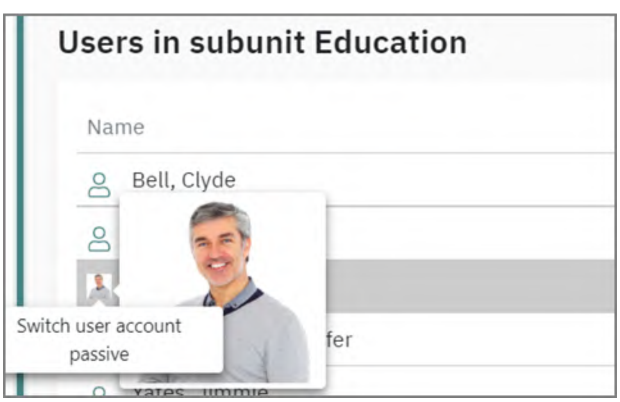


Figure 46: Profile image preview within a subunit

You can also make profile images visible to questionnaire participants. This allows them to recognize the instructor and increases their sense of connection to the process. To do this, go to the menu “System Settings/evasys Settings/Surveys Online” and select “Format PSWD document” to, for example, display the instructor's profile image on the online survey's PSWD card.

Figure 47: Profile image on PSWD document

The profile image is automatically included in the header of every online survey created by the instructor. Hover over the header with the mouse, and evasys will display a preview image of the instructor.

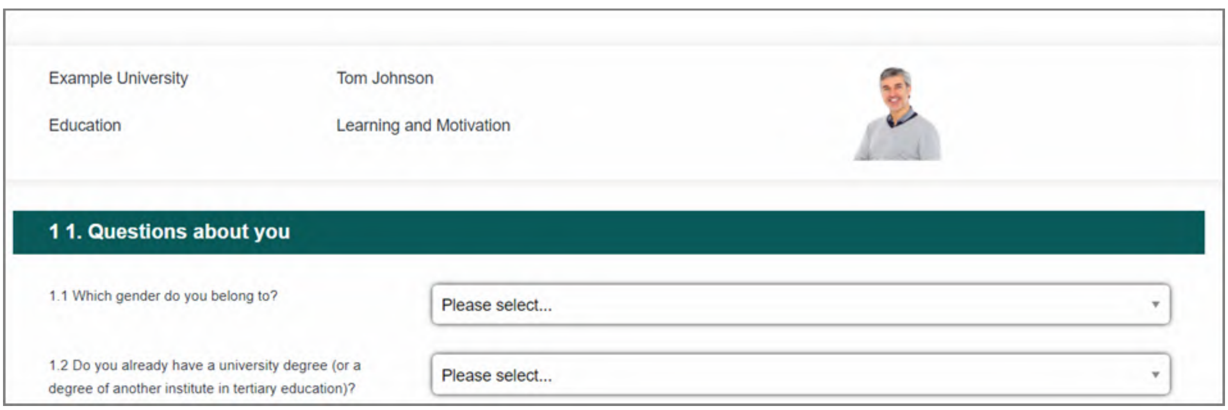


Figure 48: Profile image in the header of an online survey

If you are working with module questionnaires, the profile image of the instructor responsible for the course unit in question is displayed in the header of the relevant question group.

If, after completing the online survey, there are other online surveys awaiting your attention, then evasys will display the profile images of the relevant instructors in these surveys.

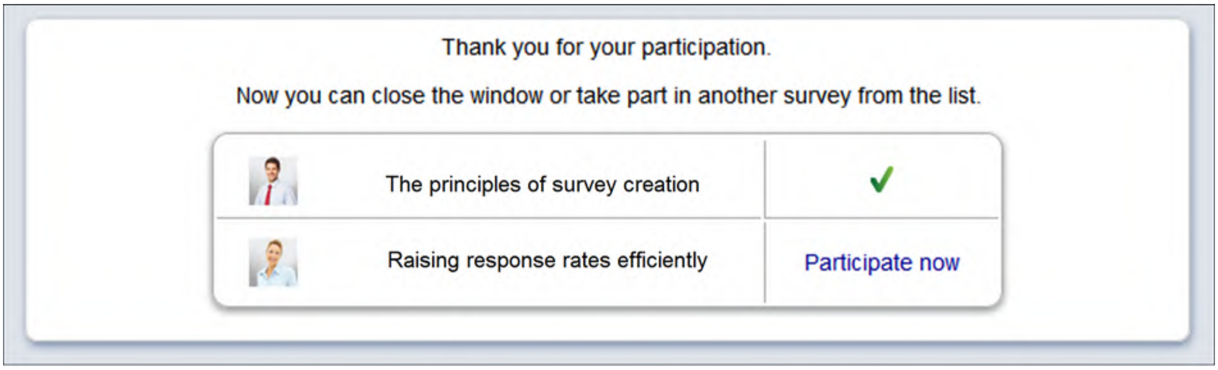


Figure 49: Profile image for additional online surveys

An instructor with an active account can also upload, change, or delete their profile picture.

Actions Available in the User List

There are several actions available in the user list, which are described as follows:

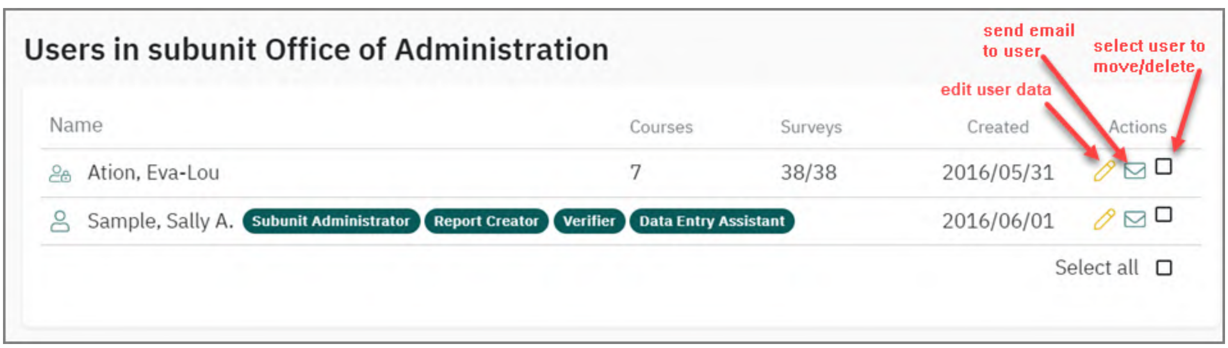


Figure 50: Actions in the User List

- **Activating/Deactivating User Account**

(not Cloud Standard)

With this function, you can activate or deactivate a user profile. Simply click on the icon directly next to the user name. Icons with a portrait and a padlock stand for passive user profiles. Icons with a portrait but no padlock, stand for active user profiles.

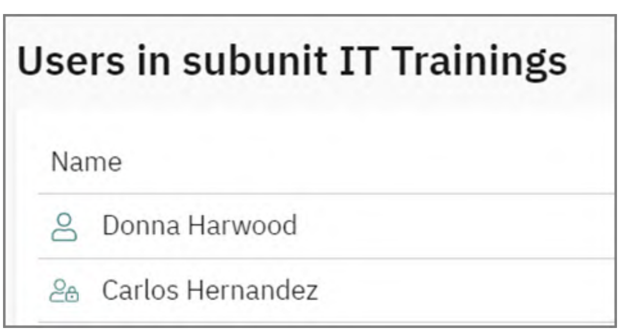


Figure 51: Active (Harwood) and Passive (Hernandez) User Account

If a user account is deactivated then the individual will not be able to login to the evasys server. If s/he does try to log in then s/he will see a message that his account has been blocked by the administrator.

An exception is the deactivation of the dean's account. The dean can log on to the system if the administrator has allowed him access to the QM-Views.

Furthermore, it is possible to give all deactivated instructors the right to access their reports from the central evaluation. In order to do this, the option "evasys Settings/ Central Evaluation/Passive Instructors: Login for Report Request" must be activated. The instructor can now log on with his id and view all the results of his surveys.

If a user is defined as secondary instructor/further report recipient for a course of another instructor, then s/he can be granted the right to also access the survey results for this course via his instructor account. To grant this right, report access for secondary instructors has to be enabled in the system settings under "evasys Settings/Data Privacy/View reports as secondary instructor". This is especially helpful for module surveys, as for this type of surveys the secondary instructor is the main report recipient (see chapter B 7. „Module Evaluation").

When using the Central Evaluation server type, passive user accounts are as a rule used to implement all or a large amount of the surveys from the administrator profile. User accounts can be activated at any time.

Change User Data

Click on the name of a subunit. A list of the users in this subunit will appear. By clicking on the pencil icon you will reach his or her user profile. Profile data can be changed by entering new data and saving it with [Save].

Addresses and institute numbers play a role only in the self-registering procedure. If an "activated" user has forgotten his password, it can be overwritten by entering the new password twice. The user can then login again and change their password.

Send Email to User

If you click on the envelope symbol in the Actions column you can send an email to the user directly from your evasys system. This function is only activated, if an email address is stored for the user. If no email address is stored, the envelope symbol is marked by an exclamation mark.

Select User for Moving or Deleting

Users can be moved into a different subunit or deleted from the system. To do this, select the desired user with the help of the select boxes in the "Actions" column. If you want to take an action for all users in the list, activate the "Select all" option below the list.

To move a user, select the target subunit from the drop-down menu below the user list and click the button [Move]. The user will now be moved to the target subunit with all his/her courses and survey data. Please note that users with the same name may already be in the target subunit (if a number of instructors have the same name). In this case, the user account will be removed and there will be two user accounts with the same name in the subunit.

To delete a user, select the desired user and click the button [Delete]. You will be asked by the system if you really want to delete the user. If you confirm, the user will be irrevocably deleted together with all corresponding survey data.

Note:
Please use this function carefully. Once deleted, the process cannot be undone.

LDAP Authentication

(not Cloud Standard)

evasys offers an interface to LDAP.

LDAP (Lightweight Directory Access Protocol) is a protocol that offers the possibility of accessing the directory server. LDAP is often used to administer the users of a network.

To use the LDAP authentication, this function first has to be activated and the connection has to be configured. There is a separate menu under “System Settings/Interfaces & Plug-ins/LDAP Settings” providing all necessary configuration settings. For further information, see chapter D 2.4.3. “LDAP Settings”. For further information please consult the separately available evasys Technical Manual.

2.1.4. Changing user roles

Users can be allowed to log in to different user roles. For example, it is possible to create a user in the role of an instructor and also as a report creator or verifier in the system. The external ID is used to link the individual user accounts to a user. Immediately after the login in evasys the user can decide in which role he wants to act.

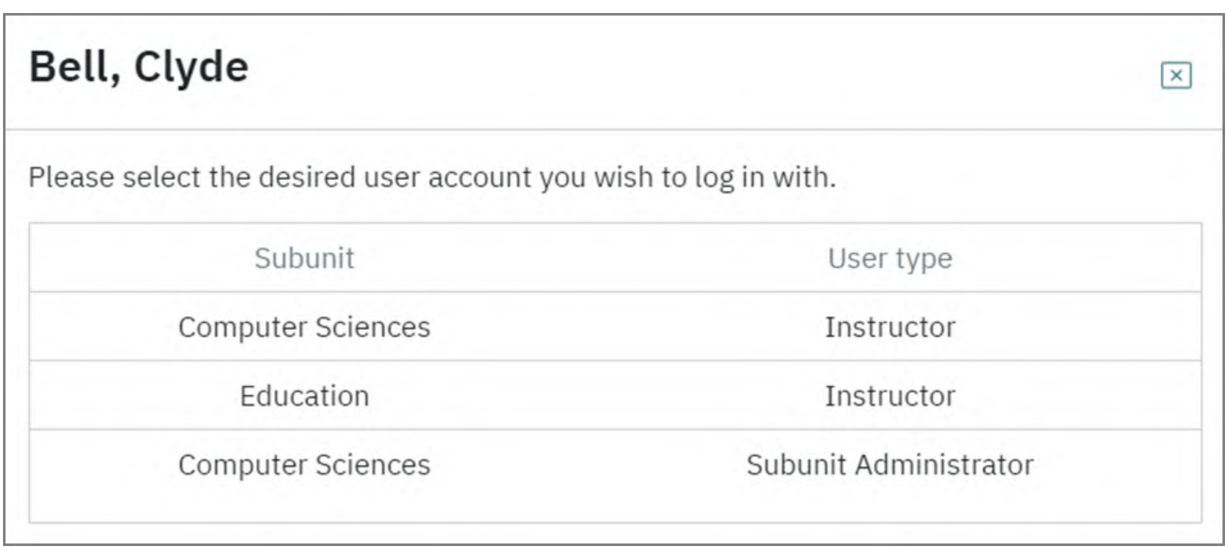


Figure 52: Selection of available user roles

The individual user accounts, allowing a user to act in different user roles, are each connected by the external ID. Therefore, it is mandatory to store identical external IDs in all user profiles that are to be assigned to this individual user.

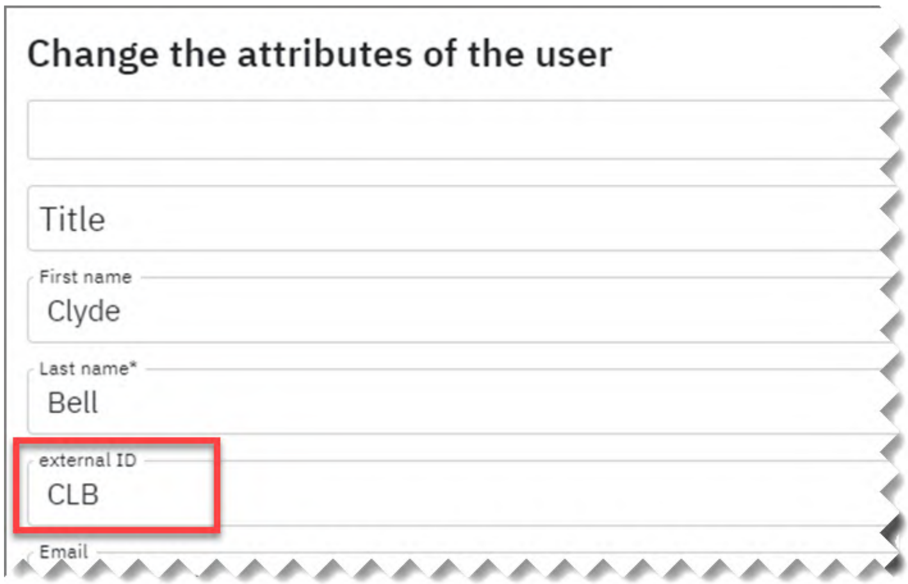


Figure 53: External ID in user profile

Users continue to log in with their individual combination of login name and password, but only need one password. The use of individual log-in data per user role is no longer necessary.

The change of user roles also works for logins via an LDAP domain, provided the corresponding profiles are linked to an external ID.

Note:
In the case of users who should only operate in individual user roles, the use of the external ID for login is not necessary and can be omitted.

To allow users to switch to different roles, the (secondary) administrator must activate the function under "Settings/evasys/Functions (Technical)/Allow User Change with Identical External ID". Furthermore, it is necessary to activate the external ID and use it in the user profiles.

Note:
If the option to change users is deactivated, the passwords of the individual accounts of a user must be different. Otherwise, users will be logged in with the account that was created first.

The evasys administrator is excluded from this function, because no external ID is available for this user role.

Switching to other roles is possible at any time by clicking on the button "Change user role". However, the individual roles of a user cannot view data such as surveys, reports or similar among themselves.

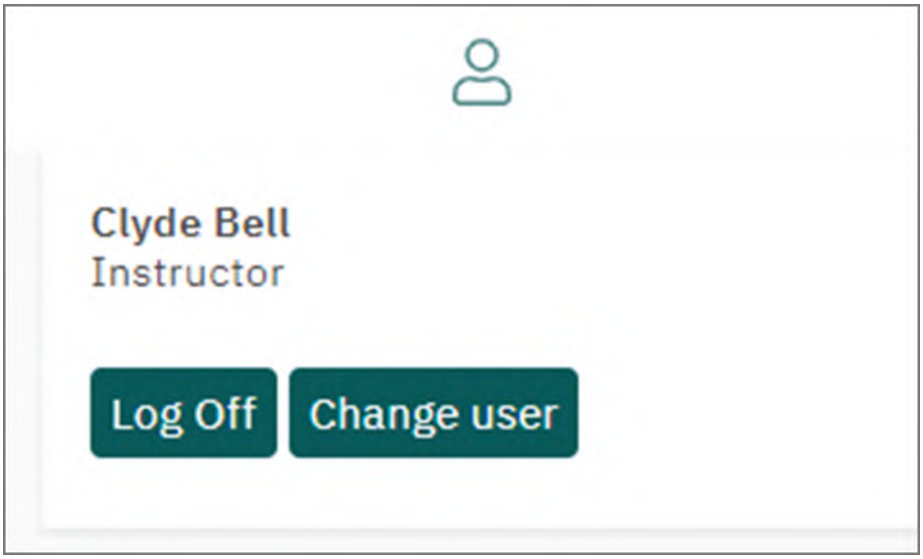


Figure 54: Button "Change user" at the end of the left side menu

2.1.5. Creating Courses

The administrator as well as the subunit administrators can assign courses to a an instructor or dean. This function is only available when using the “Central Evaluation” server version.

The basic idea of the Central Evaluation is the repetitive implementation of large-scale surveys of a correspondingly large number of courses. A survey is always related to a course. In order to be able to compare survey results each course must be evaluated only once in a given survey period. The survey period is in most cases a semester, although it could also be set as a trimester or a half semester (“System Settings/Periods”).

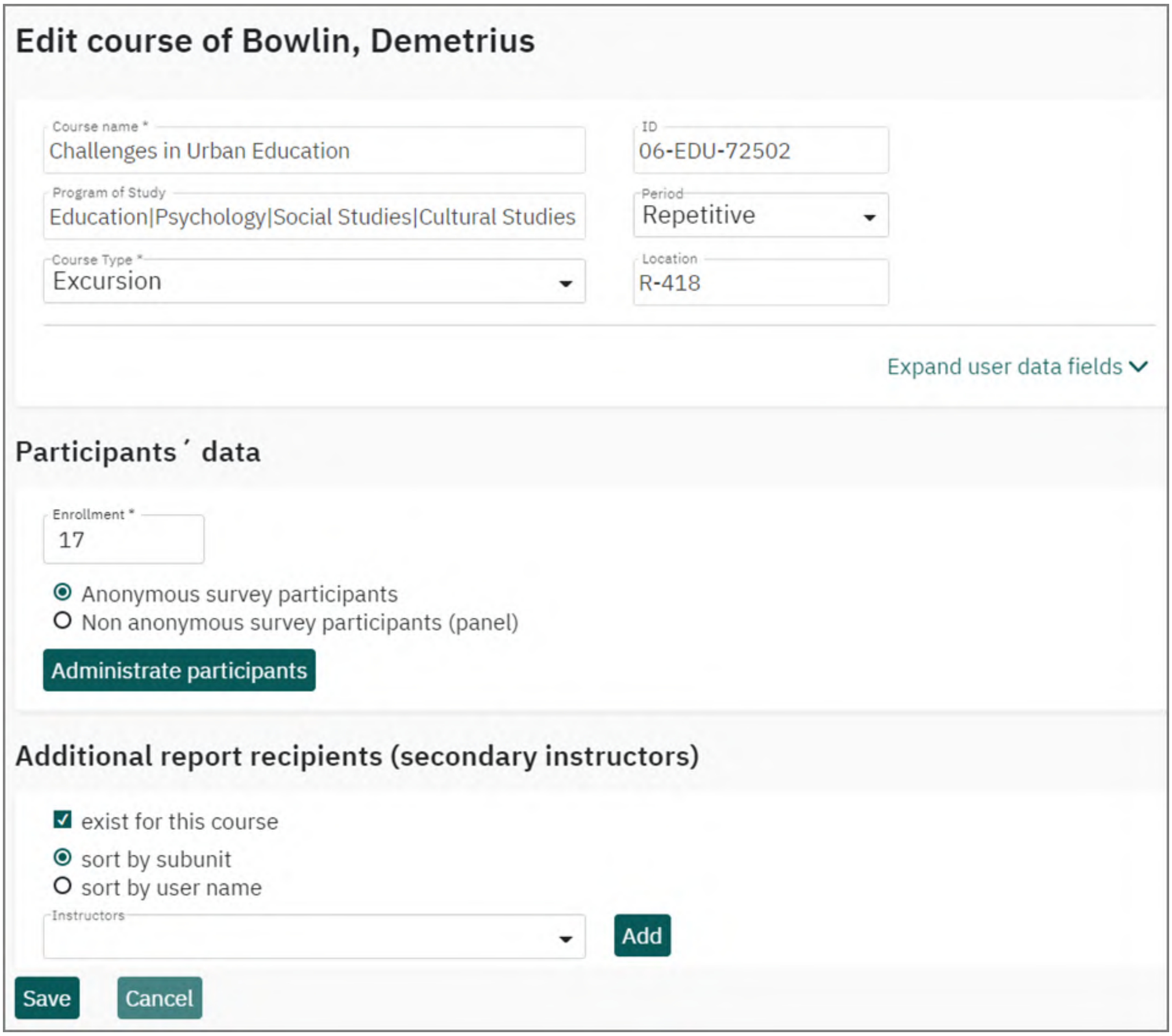


Figure 55: Create Course

The fields available for a course include:

- **Course Name**: Title of the course
- **Program of Study**: The short name of the program of studies can be used to create program of studies reports across subunits.
- **ID**: Unique ID of the course
- **Evaluation period**: Repetitive, which means that the course can be surveyed more than one time, or a specific period, e.g. 2022
- **Course Type**: Lecture, seminar, etc. Course types can be viewed and changed at ("System Settings/Course Types").
- **Location**: Optional information
- **Enrollment**: The number of students/participants in a class can be used to create the appropriate number of PSWDs for online surveys or questionnaires.
- **Participants data**: Setting of the questioning type (anonymous and non-anonymous questioning) and the suitable management of the participant data

- **Custom Course Data Fields**: These maximum twenty fields can be defined at will and be used for filtering for PDF reports. User data fields do not appear in the interface by default. If you want to define user data fields, please go to evasys Settings/ User Data Fields.
- **Further report recipients (secondary instructors)**: further report recipients resp. secondary instructors can be assigned to each course.

The contents of the text boxes Course Name, Program of Study, Course ID and Location, as well as the title and contents of additional course data (language, in the example named above) can be predefined by the administrator in the System Configuration settings, so that repeating attributes can be selected from a drop-down list (see Section "Set Predefined Values for Course Items" below). In addition, clicking on the text entry box allows you to make manual changes to the contents.

Adding, Editing and Deleting Courses Manually

To access the course list of an instructor, open the user list of a subunit. Click on the number in square brackets in the column CO next to the name of the desired instructor.

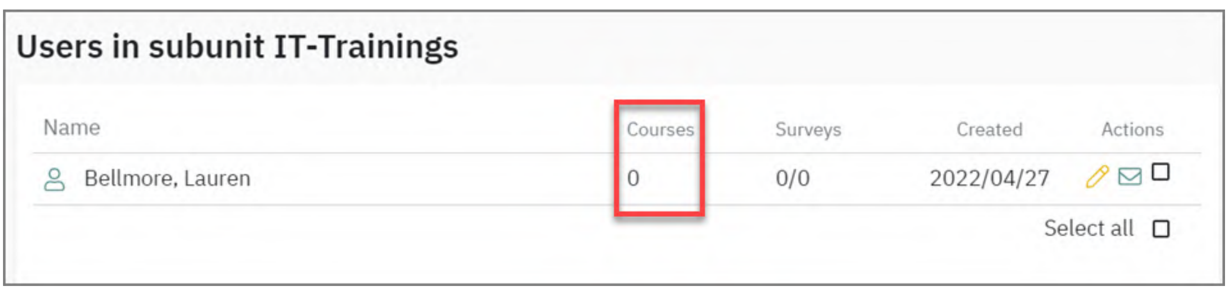


Figure 56: User List within a Subunit

The course list of an instructor opens. Via the button [Create new course] you can add new courses at any time. The entry mask shown in the picture above opens and the data for the course can be entered.

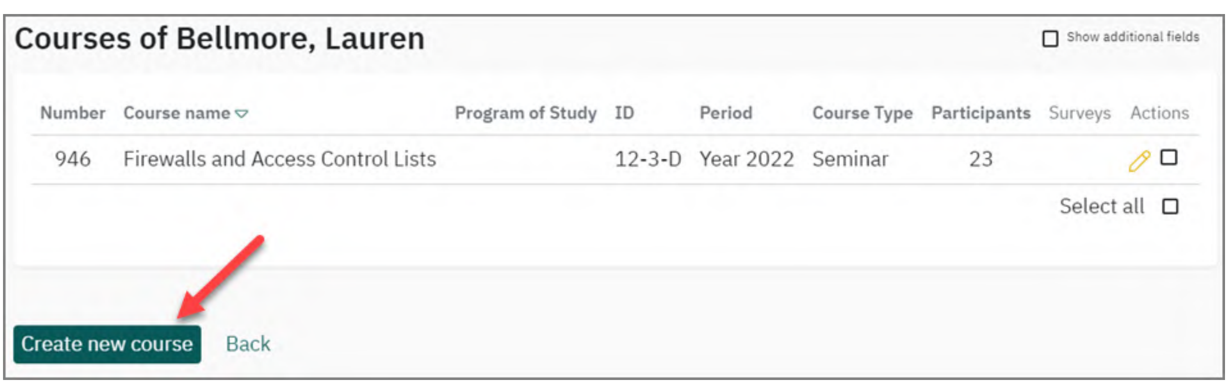


Figure 57: Course List

Existing courses can be edited by clicking the pencil icon. With the help of the select boxes you can select courses for deletion. The courses will be deleted when clicking the [Delete] button.

Note:
When you delete a course, all surveys created for this course together with all their data are also automatically deleted. This process cannot be undone!

By clicking on the respective column header, the course list can be sorted – ascending and descending.

Click the Info symbol in the "Surveys" column to have existing surveys from the course shown.

Editing Participant Data

In the details of a course, you also have the possibility of editing the participant data of a course.

In this area you can:

- manually insert participants into a course,
- delete single participants of the course,
- process existing participants,
- delete all existing participants of the course and
- import all participant data directly for this course via CSV Import.

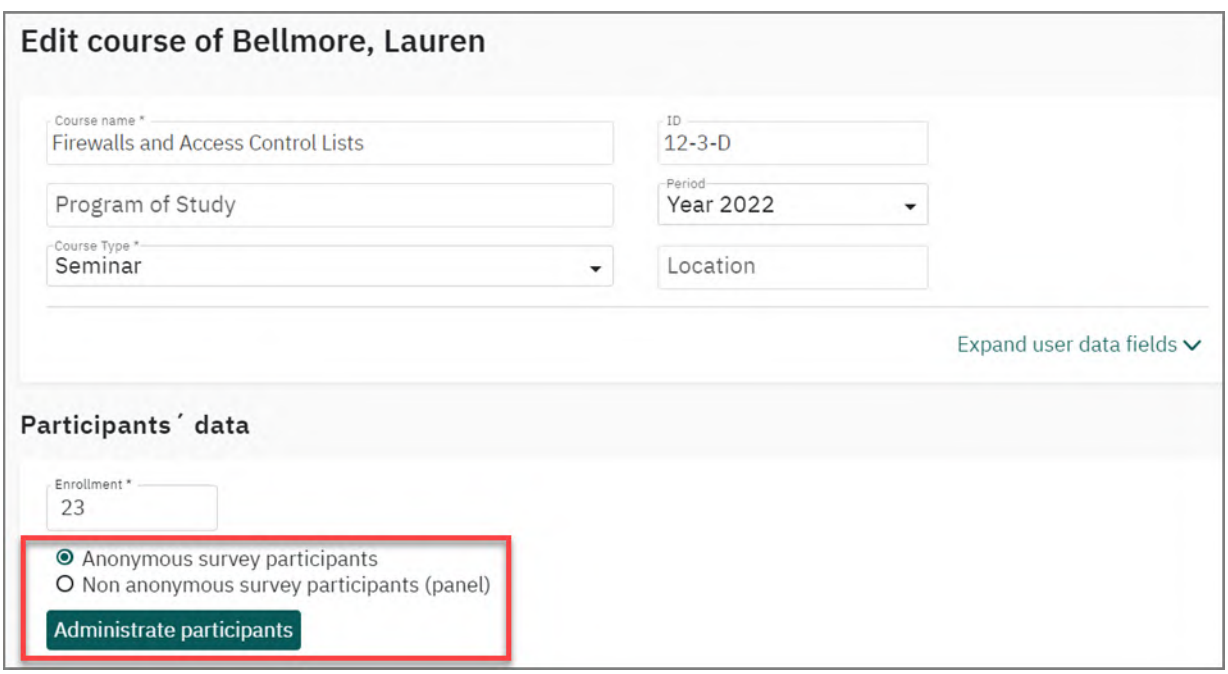


Figure 58: Editing Participants' Data in the Details of a Course

The participant data differentiates itself depending on whether you are conducting the course anonymously or non-anonymously. In anonymous surveys, the participants data only contains the participants email address (which you require to send PSWDs in online surveys). In non-anonymous surveys, you can specify further details.

The default in evasys is that courses are evaluated anonymously. If you wish to conduct non-anonymous surveys, specify this in the details of the course.

Specifying Participant Data in Non-anonymous Surveys

In non-anonymous surveys, in addition to the email address, you can also deposit other information such as first name, last name, address, title, and user defined options either on the questionnaire or on PSWD cards. Further information regarding the creation of non-anonymous surveys as well as inserting and editing participant data in non-anonymous surveys can be found in the paragraph “Importing participant data” in chapter B 3.22. “Non-anonymous Surveys”.

Specifying Participant Data in Anonymous Surveys

If you wish to evaluate the course anonymously, and therefore activated the option “Anonymous survey participants” in the above graphic, you can only insert the email address of the participants. This makes sense, for example, when you want to send the participants of an online survey their PSWDs via email.

After you have activated the option “Anonymous Survey Participants” in the details of a course, click on [Administrate participants]. In the window which opens automatically, you have the opportunity to either insert the email addresses of your anonymous participants manually or to import them via CSV import:

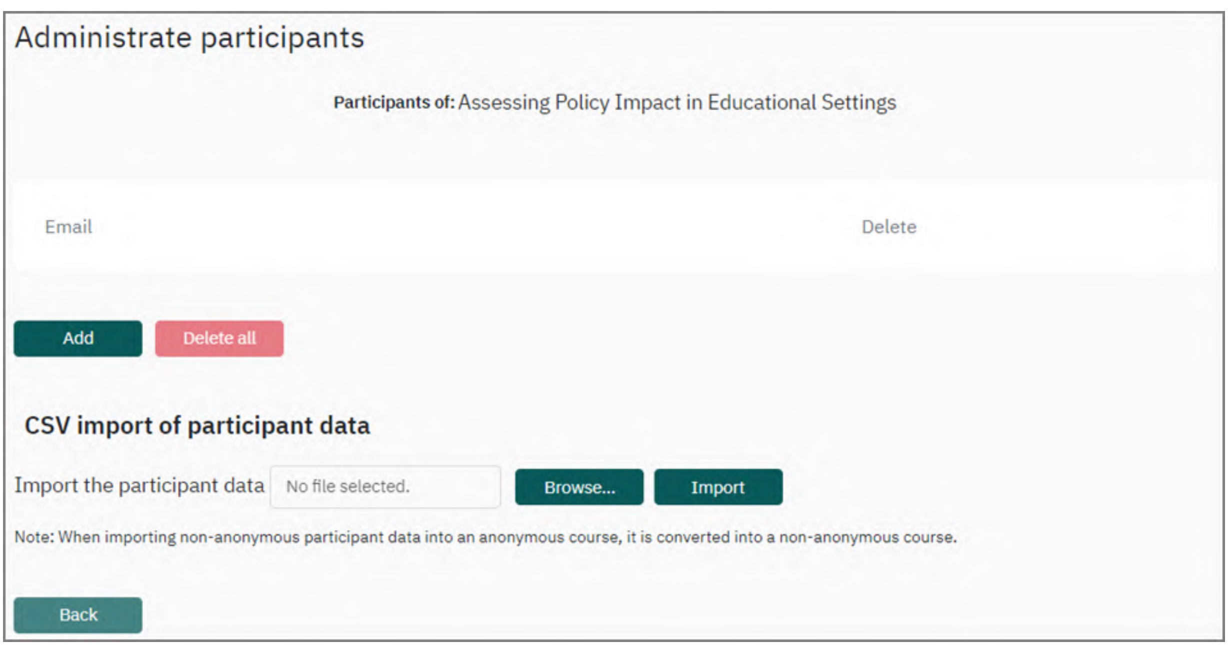


Figure 59: Adding Anonymous Participants of a Course (Overview)

If you first want to test the import of participant data, you can use the example file "Sample CSV for participants (anonymous)" which you can find in the main menu "System Information/Sample Files"

Further information on CSV-importing of email addresses can be found in chapter B 2.3. “Creating and Administrating Questionnaires”.

To enter email addresses manually, click on the button [Add] in the field “Participant of …”. The following window will open.

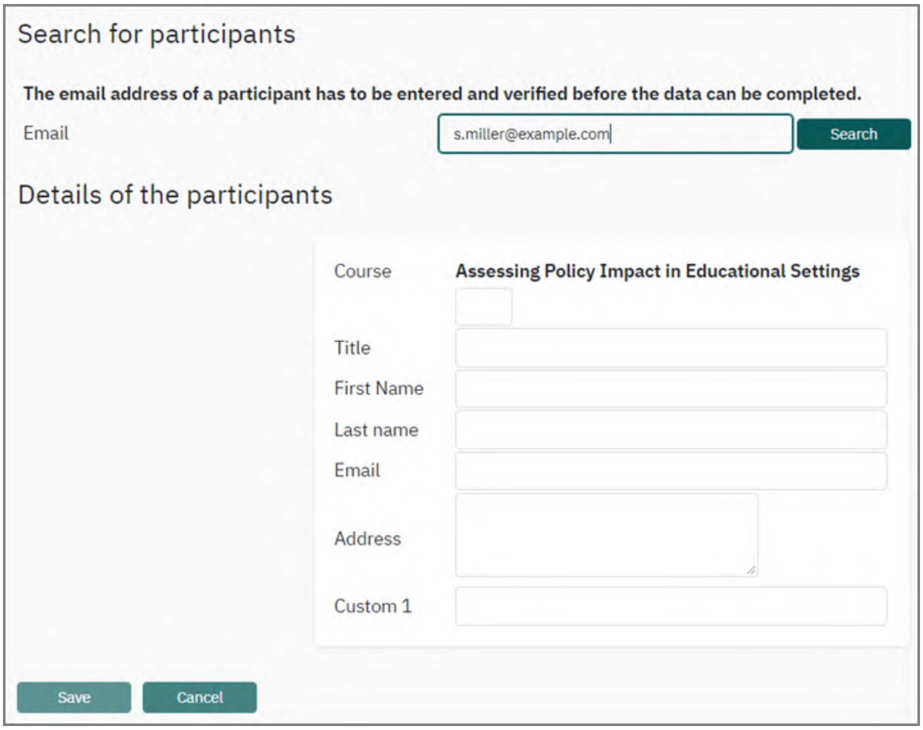


Figure 60: Adding Anonymous Participants of a Course (Details)

To enter new participants, first enter the email address of the participant in the field “Search for participants”. Subsequently click on [Search].

In the following “search” or checking of the email address you supplied, evasys checks the following:

- Is there a participant with this email address already existent in the system? (In anonymous surveys you see no impact of this, should this already be the case. In non-anonymous surveys, a data synchronization takes place, and the already existent information such as first name, last name etc., are automatically adopted.)
- Is the email valid, meaning valid within the usual rules of an email address? At this point– as well as in other parts of the system – the structure of an email address is thoroughly inspected. (This concerns, amongst others, the following rules: there must be at least one character before the “@” sign, and after it too, this character must be followed by a dot and at least two characters. Umlauts, as characters, are not allowed.)

After checking, evasys automatically adopts the email address in the area “Details of the participants”:

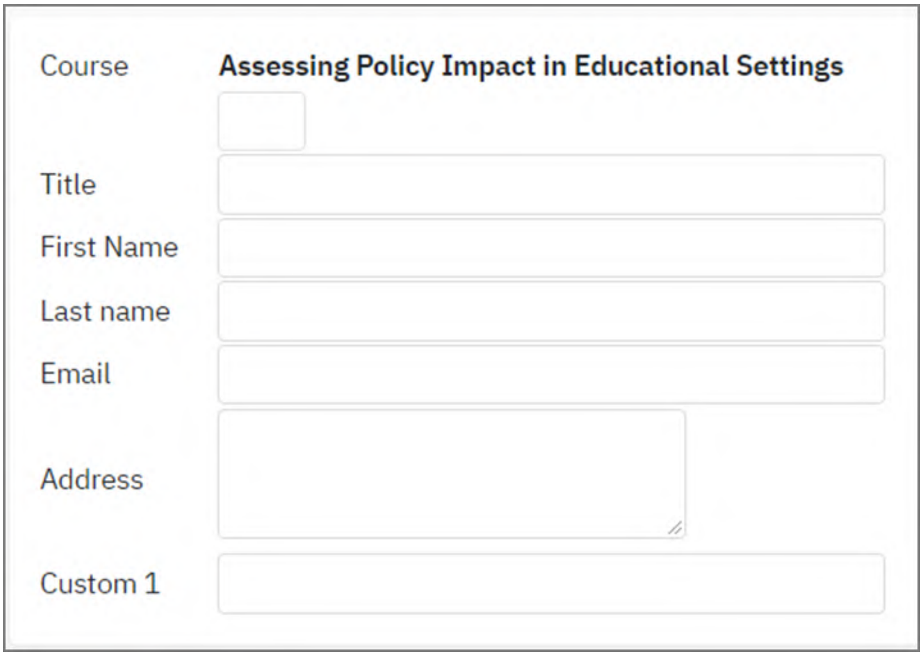


Figure 61: Entering the Email Address of Anonymous Participants

All other existing fields here, for example first name and last name, are deactivated, because this survey is anonymous.

Editing the email address in the area “Details of the participants” is no longer possible. If you have entered an email address incorrectly, you can click [Cancel] here and delete it. (After this you can enter it into the system again, of course.)

If your entry is correct, click on [Save] to insert this email address into the course:

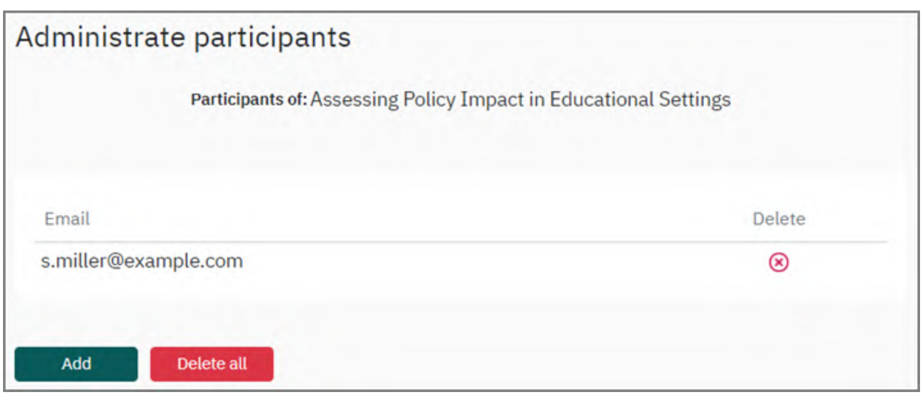


Figure 62: Email of a Participant was Added

In the case of erroneous input or a changed email address, you can also delete the email address here. To do this, click in the relevant column on the red cross.

As already mentioned, you also have the possibility of importing the email addresses of your anonymous participants via CSV import.

In the details of a course, click on [Administrate participants]. In the following window, choose the “CSV import of survey participant data”:

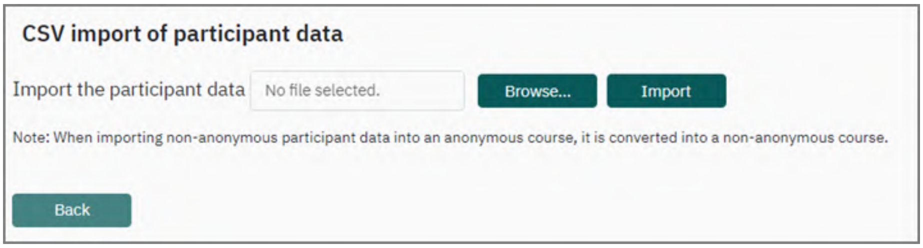


Figure 63: CSV Import of Survey Participants' Data

Click on [Browse] and indicate the location of the CSV file.

Click on [Open] and then on [Import]. The email addresses of your participants are now linked with the course:

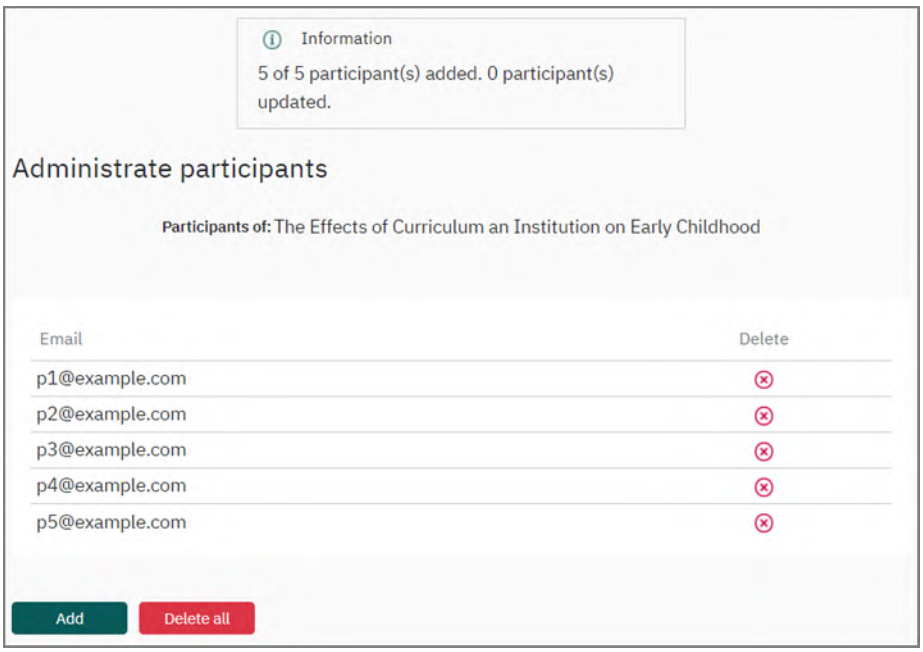


Figure 64: Import of Email Addresses was Successful

As already mentioned, you can delete single email addresses by clicking on the red cross next to the relevant email address. In addition, you can delete all email addresses by clicking on [Delete all].

Set Predefined Values for Course Items

To preset course contents, go to the menu "System Settings/evasys Settings" and select the option "User Data Fields" from the drop-down menu located in the header.

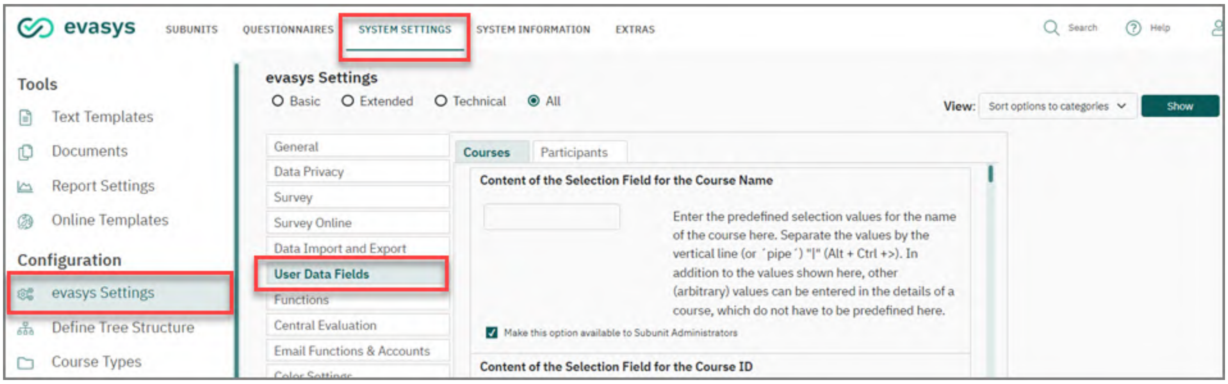


Figure 65: Edit User Data Fields

You can use the text entry boxes in the first four evasys Settings options to create contents for the following selection boxes: course name, course ID, program of study, and location. Several successive entries must be separated from one another using a vertical bar |, or “pipe” symbol ([Alt]+[Ctrl]+[>]).

You can then use additional evasys Settings entries to create further course options and define the title and contents of additional text entry boxes.

Select at “Number of additional fields” how many information fields you would like to use. You may add from 0 (zero) to 20.

Then indicate the headings of these fields at Titles, e.g. “languages” as well as the possible values of the field at contents, e.g. “English|German|Spanish”.

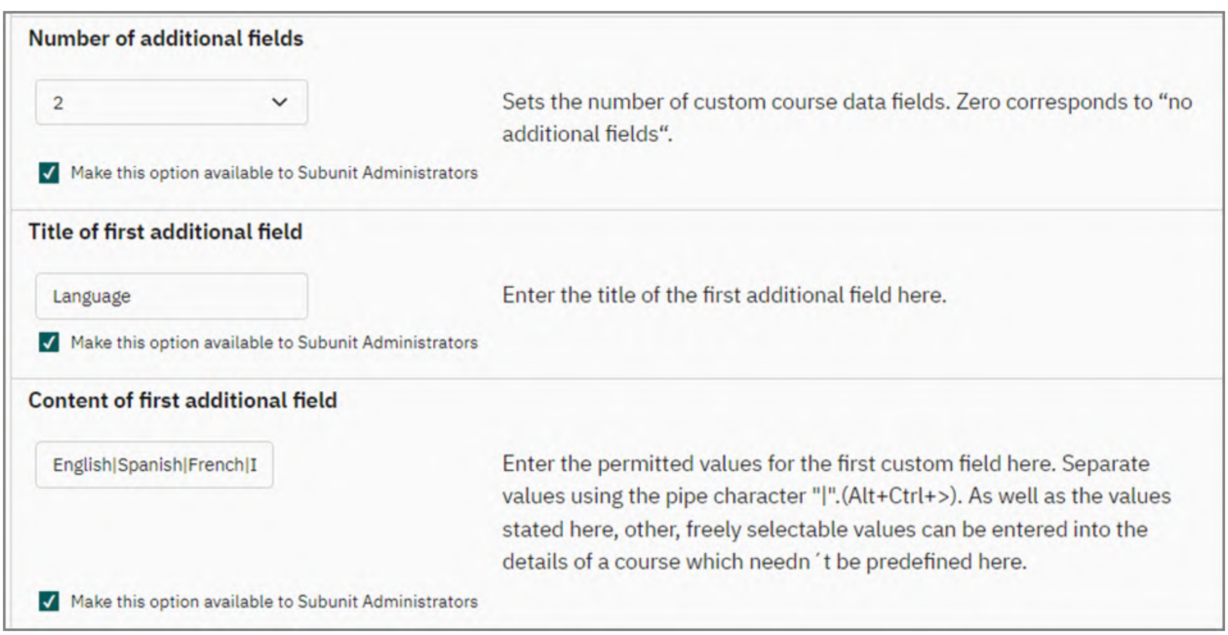


Figure 66: Define User Data Fields

These additional information fields reappear for selection in the following areas:

- CSV import of instructor and course data
- Adding and editing a course

- Raw data export through archiving
- Advanced filter settings for any compilation reports in the report creator

In the previous figure you see the user defined data fields (Language, location) in the details of a course. All predefined contents are shown here in a drop-down menu. If necessary, the content of a field can also be entered here directly.

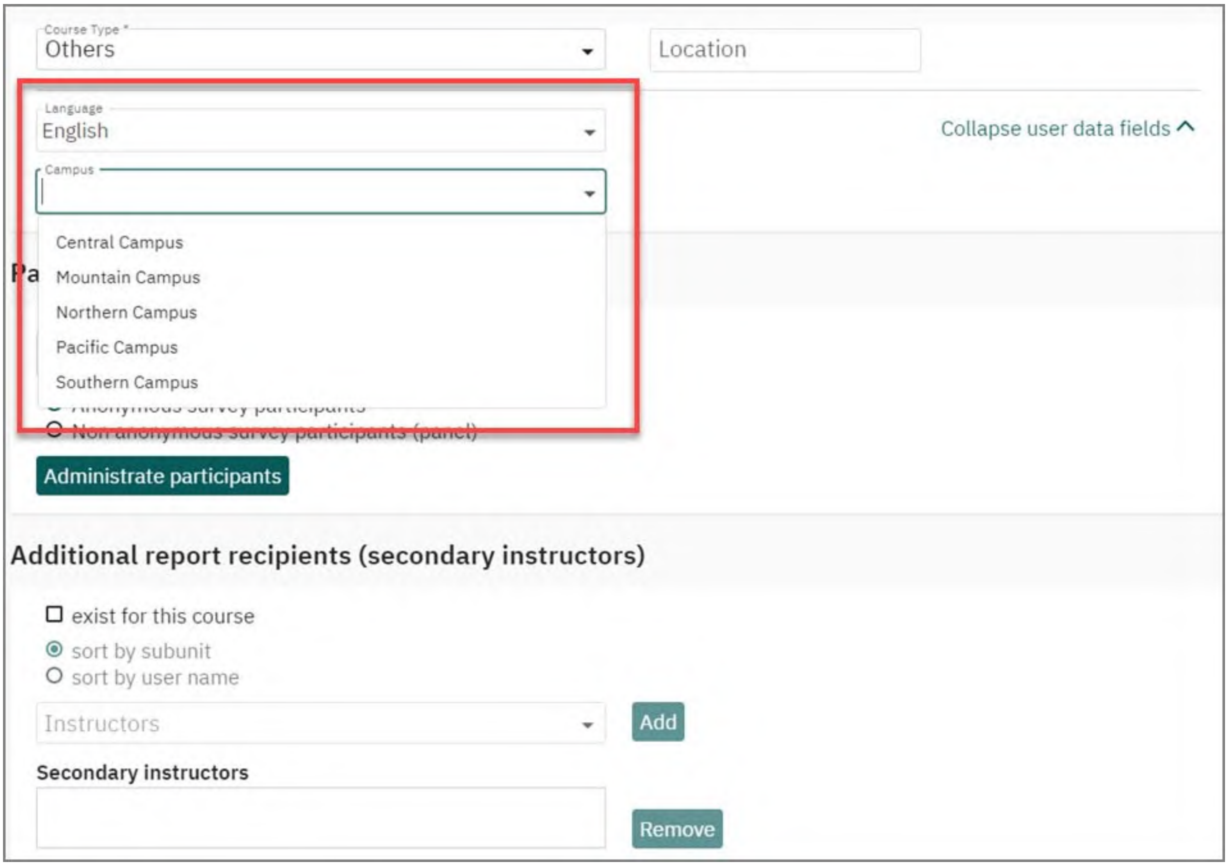


Figure 67: User Data Fields in the Details of a Course

Definition of Secondary Instructors

You can define further report recipients for courses, which are carried out by more than one person, or if a superior is supposed to receive a copy of the report. To do this, activate the option “Further report recipients (secondary instructors) exist for this course” and add the person from the list. You can search a person by writing the name or parts of the name in the search field. “*“ will list all possible persons. You can sort the list by subunit or by user name.

Figure 68: Defining further report recipients

You can also include information on further report recipients when importing the course data.

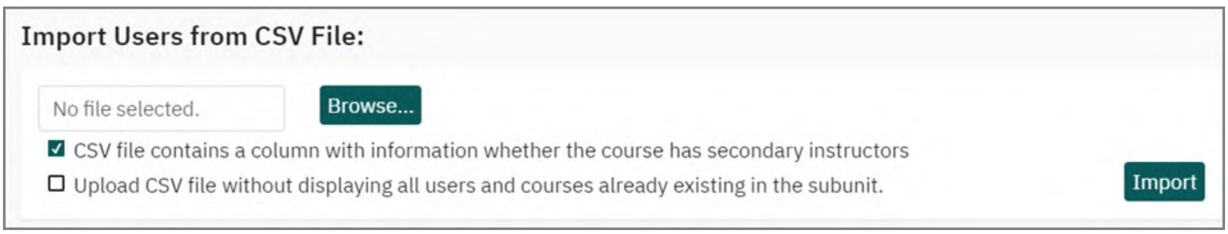


Figure 69: Activating of Secondary Instructors During the Import

Displaying Courses

The function “Display courses” in the main menu “Subunits” under “Central evaluation” offers an overview of the courses of an entire subunit. Here, along with the access to respective properties, the period affiliation of a large number of courses can be defined.You also have the chance to delete courses by one single click.

After clicking on “Display courses“, select a subunit and a survey period. Then click on [Show]. A table appears showing the identification data of the identified courses.

By clicking on the respective column headers this table can be sorted as you wish, whereby the order alternates between ascending and descending.

By clicking on the pencil icon a course can be edited. Clicking on the red cross icon will delete a course.

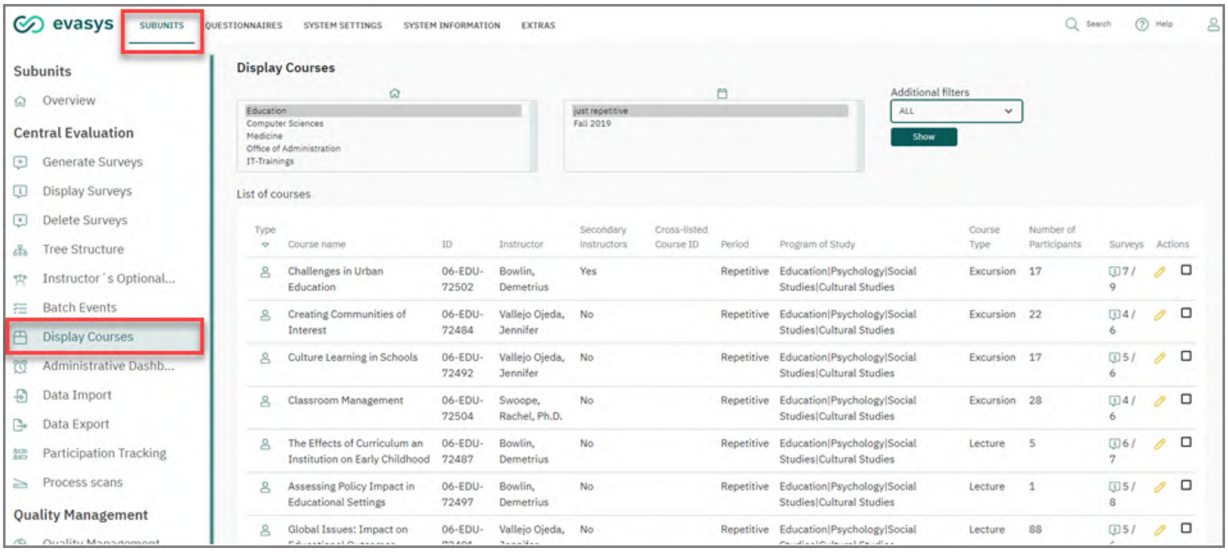


Figure 70: Display of a Subunit's Courses

At the bottom of the table a function is available which allows you to redefine the period link of one or more courses. This site also helps you to clean up your system. Via "Additional filters" you can display all courses, either with or without a survey, or anonymous and non-anonymous ones.

Figure 71: Redefine the Period link of one or more Courses

Select either an individual course by ticking the check mark box on the right side of the table, or select all courses by ticking the check mark box "Select all". Then determine from the period selection list the respective survey period and click on [Assign].

2.1.6. Cross-listed Courses

Courses can be linked by a cross-listed ID and thus be marked as belonging together. For surveys which are generated with cross-listed courses, an aggregated report containing the data of both linked surveys as well as an individual report for each survey is available.

A frequent use case are courses which are offered in different programs of study in your student information system, i.e. the course exists more than once and can be selected by participants of different programs. However, it is physically a single event and therefore needs to be evaluated together.

A user data field containing the cross-listed ID must be created to link the courses. As described in the previous chapter, create a corresponding user data field in the "Settings / Configuration" menu in the "User data fields" tab. You can freely chose the title of the user data field. It is not necessary to predefine the IDs in the field "Content".

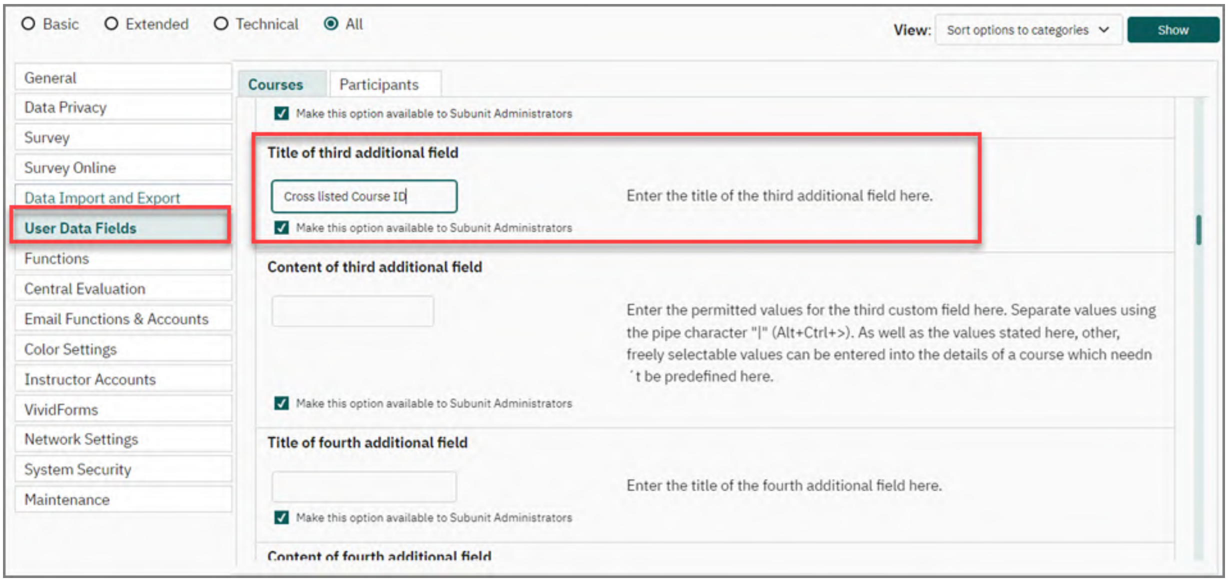


Figure 72: Create User Data Field for Cross-listed Course

To let the system know which field is used for the cross-listed ID, please select the corresponding field from the drop down list in the "Cross-listed Courses" section of the same menu. By saving the settings, the function is automatically activated.

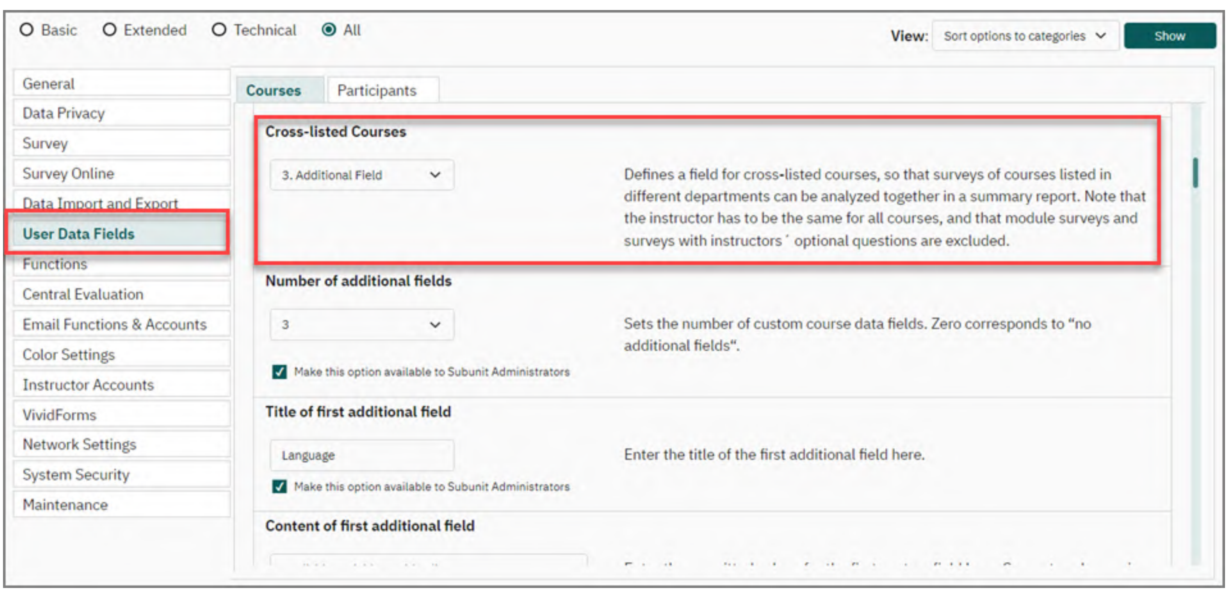


Figure 73: Activate Cross-listed Courses

Make sure that you also adjust the option "Number of additional fields" so that the field is actually displayed in the course dialog later.

When manually creating or importing courses, you can enter an ID in the corresponding field for the courses that are to be linked. This ID is displayed in the details of the course and in the overview of the courses, which can be accessed in the "Display

Courses" menu. By clicking on the table heading, you can display the courses sorted according to your ID.

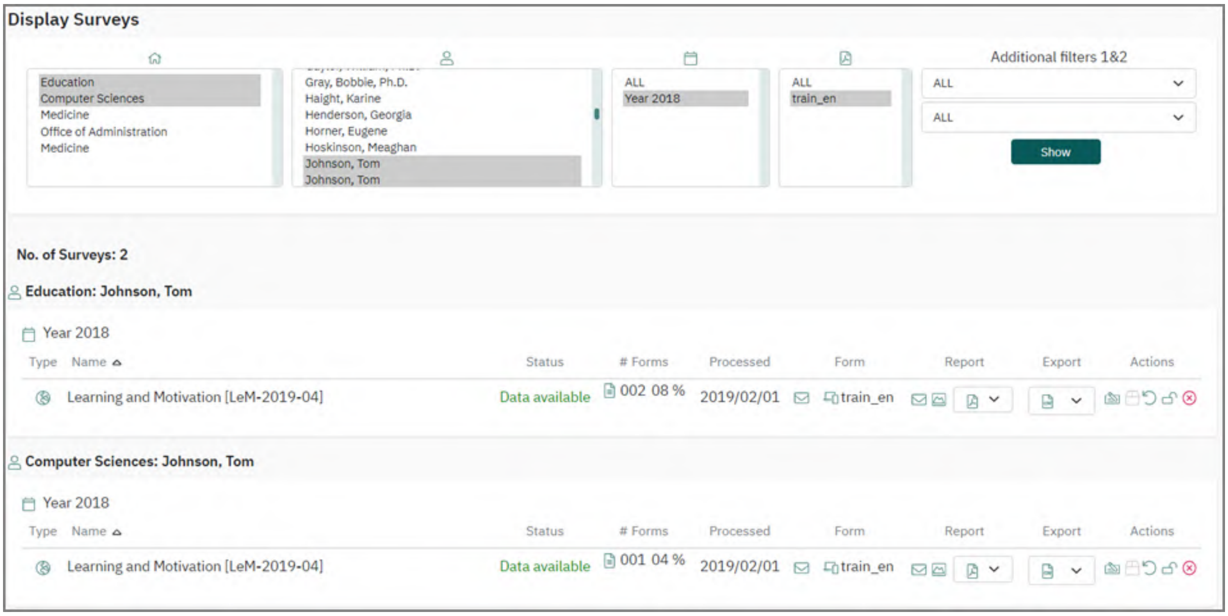


Figure 74: Display Courses - Cross-listed Course ID

Please note that it is only possible to link courses if it is a course of the same instructor who is created in several subunits and linked with the help of the external ID. This means that the lecturer Tom Johnson from the above example exists in two subunits (Physics and Computer Science). The two user accounts are linked by the external ID. For further information on the external ID, please see section “Using External IDs“.

In addition, the title of the courses must match.

Please note, that cross-listing courses is not available for predefined questions and module surveys.

The surveys for cross-listed courses are created and carried out as usual. The survey name is automatically supplemented by the cross-listed ID. As soon as the survey has been completed, the report is automatically available in the survey list and in the survey details in addition to the report for the individual course:

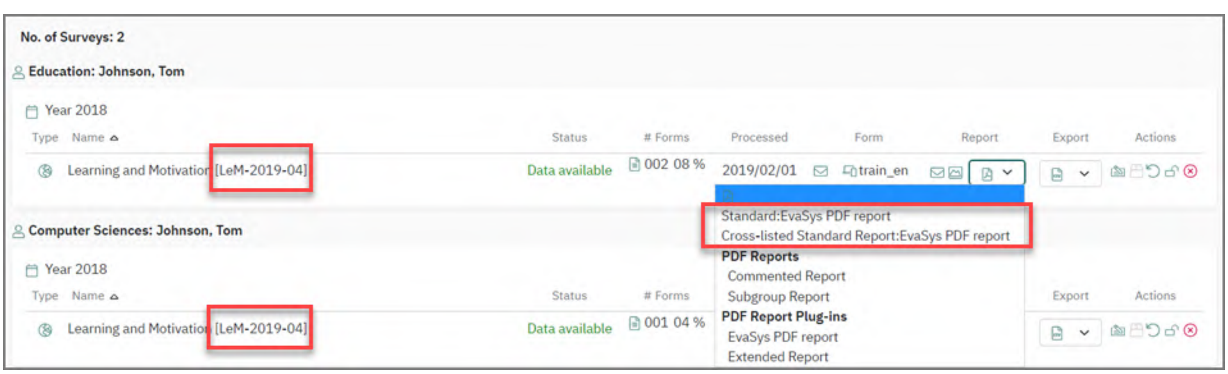


Figure 75: Show Cross-listed Report in the Survey List

The cross-listed reports can also be sent via the batch events. Please note, however, that the selection may only contain surveys which are based on the same questionnaire and share a common ID.

2.2. Import Interfaces

Especially for large amounts of topics, courses or modules it can be advisable to integrate data into your system via an automated interface or data import. This way, the course catalogue can be quickly and easily transferred to evasysat the beginning of a semester.

evasys offers several ways to transfer data from external data sources:

- **Data Bridge (license-bound)**

The integrated Data Bridge allows the connection of third-party systems or the transfer of data from an external data source via ODBC connection or CSV import. The import of the data can be time-controlled (for example, once a week / semester / year) and offers extensive possibilities for data cleansing and validation. In addition to the integration of courses and participant data, it is also possible to automatically generate surveys (with time-control, if desired), leading to an almost fully automated control of the evaluation process.

For further information on setup and use, please refer to the evasys Technical Guide. If you are interested in licensing the Data Bridge, please contact your vendor.

- **Web Services**

With the help of web services, your in-house developers can use the SOAP API and our Software Development Kit (SDK) to import data from existing management systems. For further information, consult the SOAP API Guide which can be found in “System Information/Documentation/Manuals“.

- **CSV Import**

With the help of the CSV import, a list of users and courses can be imported into the system. Since a CSV file can be easily converted from an existing Excel spreadsheet, this is a quick and easy way to import the data per subunit into the system.

Via CSV, email addresses of the survey participants can also be imported into the system in a separate import process.

- **XML Import**

Via XML import, data can be uploaded into the system across different subunits. In contrast to the CSV import, the XML import requires technical knowledge. The XML format does not only allow the transfer of user data and courses, but also offers the possibility to include participant data into the import process as well as surveys (with time-control, if desired). For further information on the XML import, please consult the evasys Technical Guide.

2.3. Creating and Administrating Questionnaires

- Creating questionnaires
- Questionnaire administration
- Detail view of the questionnaire
- Advanced questionnaire settings
- Characteristics of VividForms Designer Questionnaires
- Question Library

Questionnaires are the basis of every survey. They contain various types of questions and in turn provide different types of information – such as information on the respondent (such as age) and information on the quality of the object in question (such as the instructors' expertise).

Questionnaires can be created by:

- The administrator. S/he uses questionnaires for central evaluations and makes them available to active instructors. If a questionnaire is defined as a template it can additionally be modified by active instructors.
- Subunit administrator. S/he, too, can use them for surveys and make them available to the instructors of his own subunit(s). Also the subunit administrator can create templates (also for the instructors of his own subunit).
- Active instructors. Once they have been granted authorization to access the VividForms Editor resp. Designer they can create questionnaires (however, they cannot create templates).

A questionnaire created in evasys serves as a template in order to create any survey with it. If the utilization has not been restricted, it can be used system-wide for as long as you wish, and for all surveys that you consider necessary. A questionnaire is, therefore, media-independent. You can create paper as well as online surveys with it.

To create a questionnaire you can use the VividForms Editor which is by default installed and can be started directly in evasys, or the VividForms Designer which is only available if licensed. The VividForms Editor allows you to create a questionnaire quickly and easily. The VividForms Designer offers you a wide scope of design. To learn more about the usage and characteristics, please consult the manual of the corresponding tool.

In the following sections you will learn where to create the questionnaires, how to administer them, and which advanced settings can be performed. It makes sense to already have drafted a questionnaire as this aids understanding.

2.3.1. Creating questionnaires

Questionnaires are usually created by the Administrator, Secondary Administrator, or Subunit Administrator.

Questionnaires created by the Administrator are available to all Subunit Administrators across the system. They can use the central Administrator questionnaires but cannot edit them. A copy of the original questionnaire has to be created to edit them.

If Subunit Administrators create their own questionnaires, these may only be used in their own respective subunits. The Administrator can view the created questionnaires at any time and, if required, edit them.

Administrators and Subunit Administrators can also grant Instructors/Trainers as well as Deans/Subunit Managers the right to create questionnaires. For this, corresponding access is granted in the respective user's details.

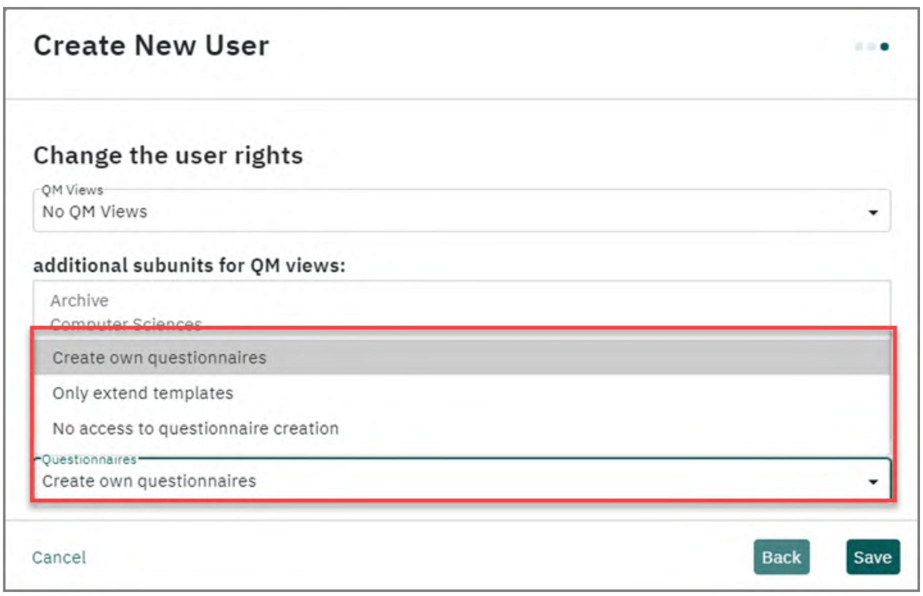


Figure 76: Questionnaire creation access rights for active users

The following settings can be undertaken:

- Unrestricted access: The user can construct completely new questionnaires or process the specified templates.
- Extension of templates only: The user can expand Administrator or Subunit Administrator templates by several questions, but cannot create their own questionnaires.
- No access: The user cannot process or create questionnaires, but can only use questionnaires that have been provided by the Administrator or Subunit Administrator.

Two tools for creating questionnaires are shown in the main window: the VividForms Editor (left) and the VividForms Designer (right).

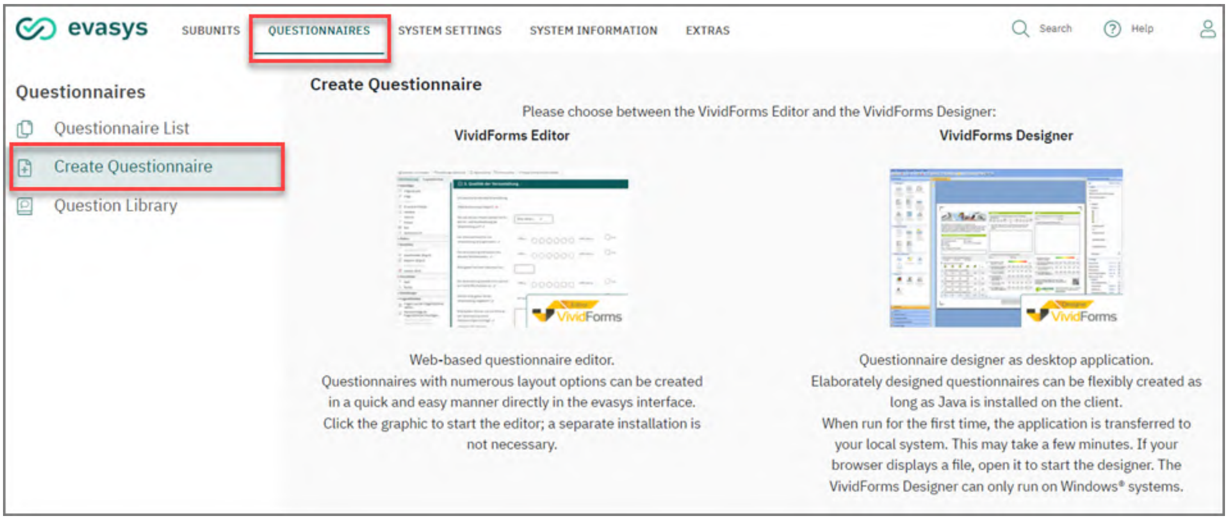


Figure 77: Creating Questionnaire

The respective tool can be opened by clicking the image. The VividForms Editor is licensed by default; to use the VividForms Designer a license has to be purchased and the respective user assigned at “System Information/License/VividForms Designer Licenses”.

If no license has been purchased or assigned yet, the Administrator/Subunit Administrator can only start a demo version of VividForms Designer. The functions of the Designer can be tested in this demo version, but no questionnaires can be saved or transferred to evasys. If only a demo version is available, this can be recognized by the word “DEMO” above the image.

Hint:
A demo version of the Designer is always provided to Administrators and Subunit Administrators, but not to active Instructors/Trainers. If active Instructors/Trainers should also have the option of testing the Designer, the Administrators/Subunit Administrator can release the demo version for active users at “System Settings/ evasys Settings/VividForms/VividForms Designer Demo Version “.

The VividForms Editor opens directly in the evasys interface and so you can immediately begin to create a questionnaire. Refer to the separately available “VividForms Editor Manual” for detailed information on creating a questionnaire. This can be opened directly in the Editor with the [Help] button.

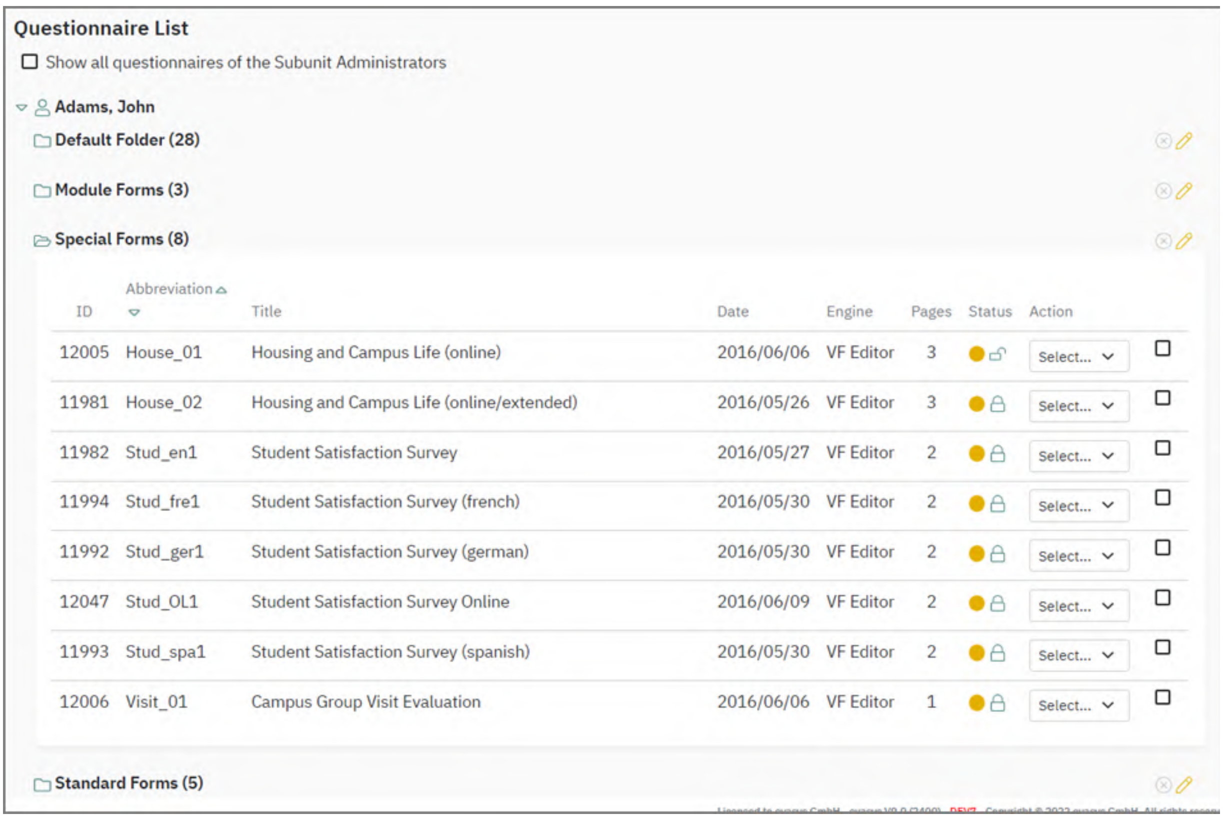
The VividForms Designer is a Java web start application and has to be downloaded before the initial start by clicking on the Designer image. Please note that a Java runtime environment has to be installed on the local computer for this. Refer to the separately available “VividForms Designer Manual” for detailed information on using the Designer. This can be directly accessed in the help section of the Designer.

Administrators and Subunit Administrators can also find both manuals in the menu “System Information/Manuals”.

2.3.2. Questionnaire administration

If a questionnaire was created with the VividForms Editor, it is available directly for use in evasys. Questionnaires created with the VividForms Designer first have to be transferred to evasys (i.e. “published”).

The list of questionnaires is located in the main menu “Questionnaires”, there in the sub-menu “Questionnaire List”. First you will see a list of all questionnaires of the administrator. The abbreviated name (5 to 25 characters), the description, the status of activation and the engine (VividForms editor or VividForms designer) are depicted.



ID	Abbreviation	Title	Date	Engine	Pages	Status	Action
12005	House_01	Housing and Campus Life (online)	2016/06/06	VF Editor	3		Select...
11981	House_02	Housing and Campus Life (online/extended)	2016/05/26	VF Editor	3		Select...
11982	Stud_en1	Student Satisfaction Survey	2016/05/27	VF Editor	2		Select...
11994	Stud_fre1	Student Satisfaction Survey (french)	2016/05/30	VF Editor	2		Select...
11992	Stud_ger1	Student Satisfaction Survey (german)	2016/05/30	VF Editor	2		Select...
12047	Stud_OL1	Student Satisfaction Survey Online	2016/06/09	VF Editor	2		Select...
11993	Stud_spa1	Student Satisfaction Survey (spanish)	2016/05/30	VF Editor	2		Select...
12006	Visit_01	Campus Group Visit Evaluation	2016/06/06	VF Editor	1		Select...

Figure 78: List of questionnaires

The questionnaires are managed in folders. New questionnaires are always initially stored in the standard folder. You can rename this, if desired, by clicking the pencil icon in the header.

You can also add more folders by clicking the [Create new folder] button. In this way, questionnaires can be managed separately, according to different topics for instance. The newly created folders are added in alphabetical order underneath the standard folder.

To transfer a questionnaire to a new folder, activate the checkbox for the respective questionnaire in the far right column of the questionnaire list. In the "Action" area, select the desired folder from the drop-down list and click [Proceed]. The questionnaire is moved to the selected folder.

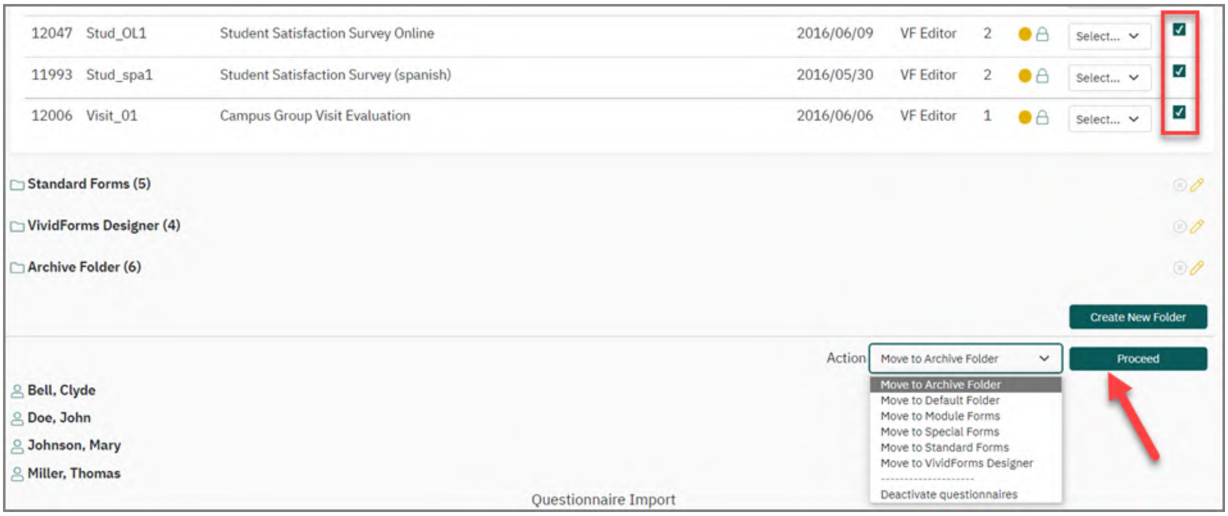


Figure 79: Transferring and Deactivating questionnaire

You can also use the checkbox to deactivate many or single questionnaires. Deactivated questionnaires are no longer available for generating new surveys and are, for example, no longer displayed in the questionnaire list in the "Generate surveys" menu. Old questionnaire versions which are no longer used should always be deactivated in order to keep the system clear. Of course, you can still use the questionnaires to create reports.

To deactivate the questionnaires, open the drop-down list, select the option "Deactivate questionnaires" and click [Proceed]. Deactivated questionnaires are greyed out. You can now move them to the archive folder in the next step.

Figure 80: Deactivated Questionnaires

Click the folder name to open the list of the questionnaires it contains.

Your own folders can be deleted if they do not contain any questionnaires. The standard folder and the archive folder cannot be deleted. The former contains all deactivated questionnaires as well as questionnaires with module surveys.

The Administrator can, if required, allow all the questionnaires of the Subunit Administrators to be displayed. For this in the head of the side the option “Show all questionnaires of the Subunit Administrators” is activated.

Subunit administrators can access by default the questionnaires of administrators and secondary administrators and use them for their surveys. However, they may not edit the questionnaires, but may only use or copy them in the original. If access to the questionnaires is not desired, the administrator can block such access via the corresponding configuration setting ("System Settings/evasys Settings/Data Privacy/Sub-unit administrator: Access to questionnaires").

A VividForms Editor questionnaire can also be imported into the system in the "Questionnaire Import" section underneath the folder list. This import interface is used to exchange questionnaires between different systems or users.

Figure 81: Questionnaire import

The VividForms Editor questionnaire can be exported from an evasys in the questionnaire details in the form of a vfd. file (see below chapter B 2.3.3. "Detail view of the questionnaire"). Select the file with the [Browse] button, activate the option "VividForms" and click [OK]. The questionnaire is now uploaded and appears in the questionnaire list.

Note:
Only VividForms Editor questionnaires can be uploaded into the system with this import function. VividForms Designer questionnaires always have to be published to evasys from the Designer.

In the "Action" column, different activities can also be undertaken via the questionnaire list. A questionnaire can be edited, copied, and deleted depending on status and engine.

If the option "Edit" is selected, the editor opens to revise the questionnaire.

Note:

A questionnaire can only be edited if no surveys have yet been compiled with it. The questionnaire is automatically protected from changes when surveys are created for it. This occurs in order to guarantee the processing of forms which are already in circulation. No changes to layout or content can be undertaken on protected forms.

Protected questionnaires which should be changed for future surveys can therefore be copied. When copying a questionnaire, the user can decide which features of the questionnaire, beyond the standard features (questions, free texts, formatting, etc.) should be copied:

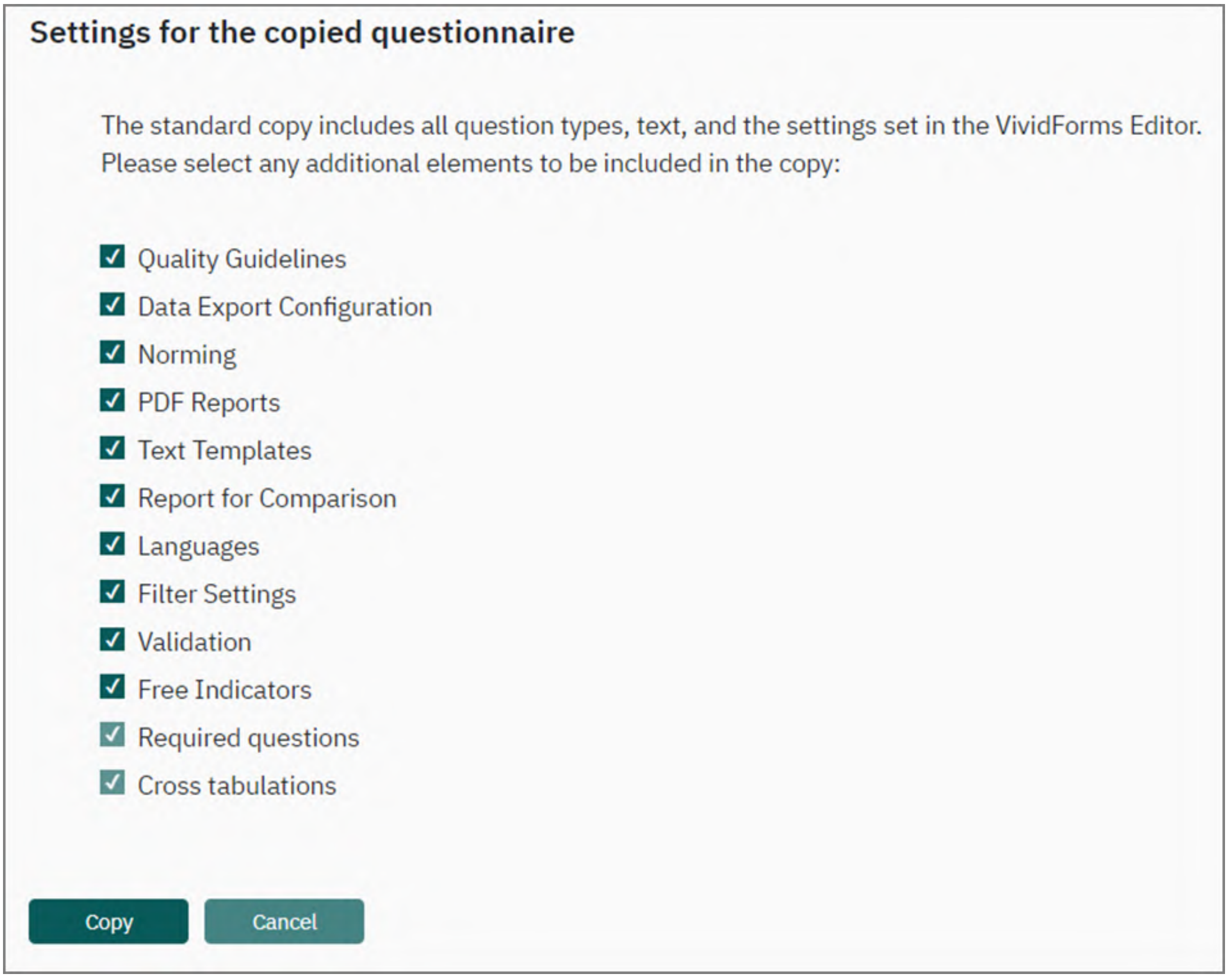


Figure 82: Copying a Questionnaire

After clicking the button [Copy] the questionnaire list will show a copy of the questionnaire. The description text of this questionnaire is marked by the annotation “[Copy]”, the abbreviated name is counted up. This copy can then be edited in the VividForms Editor as it has not yet been used in a survey.

The questionnaire, along with all the collected survey data, can be deleted with the option “Delete” in the column “Action”. This means that the questionnaire and the survey results will be permanently deleted from the database.

Note:
Please note, that by deleting the questionnaire, all surveys and their results will also be deleted. For this reason, deactivating a questionnaire instead of deleting it is recommended.

Before the questionnaire is permanently deleted, the delete process must be confirmed by the user again. In this case, evasys informs the user how many surveys will also be deleted. The delete procedure can be canceled at any time by clicking the button [Cancel]. By clicking the button [OK], the questionnaires and all related surveys and their results will be deleted.

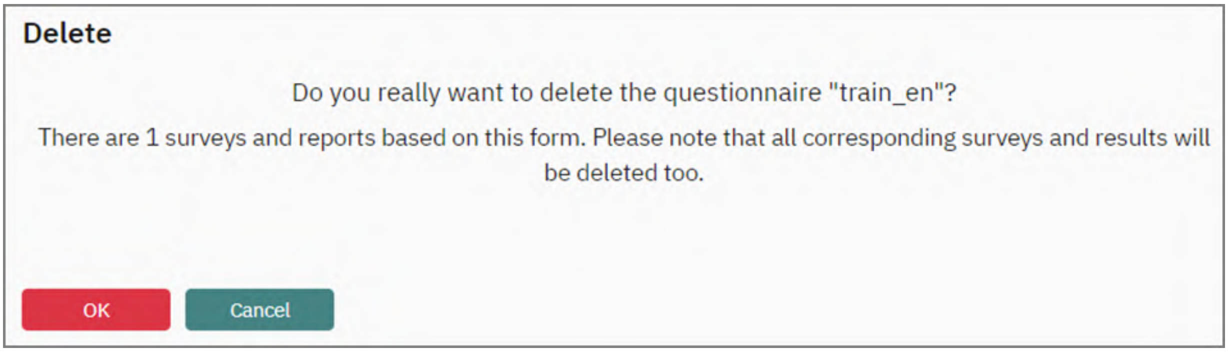


Figure 83: Deleting a Questionnaire

2.3.3. Detail view of the questionnaire

Further details about a questionnaire can be opened when the option “Details” is selected in the column “Action” in the questionnaire table.

This window is subdivided into two sections. In the top part you can, among other things, open the PDF files.

Figure 84: Details of a Questionnaire

With which Engine the questionnaire was created (VividForms Editor, VividForms Designer) can be seen on the top left.

A sample questionnaire can be opened with the option “PDF Sample”. Click the option “Show” for this.

Note:
The PDF sample is for viewing purposes only and cannot be used for surveys!

In the Recognition Set of the VividForms Reader

The VividForms Reader must “know” the forms that you are using, so it knows where to look for answer box areas. Only with the aid of this information can it evaluate the graphics of scanned questionnaires. In this way it checks during the evaluation that in those areas where crosses could lie, areas are actually blackened.

For this reason, the VividForms Reader has at its disposal a file in XML format for every questionnaire, which defines this form (definition file; XML is a description language). The pool of these definition files is know as “Recognition Set“.

However, evasys first makes such a definition file available to the VividForms reader, when you have created the first survey with a new questionnaire (regardless of whether a paper or online survey). Only then at this moment is the VividForms Reader informed of your form and the answer box areas on it. This means precisely, that the pool of XML files available to the VividForms Reader is only then complemented with the new XML file. This then defines your new form. (With each new creation of a survey, this XML file is refreshed).

As soon as you create a survey for a VividForms questionnaire, a corresponding form definition file in XML format is added to the recognition set of the VividForms Reader. The questionnaires scanned in are evaluated by means of these form definition files. This means, that the VividForms Reader knows from these form definition files, which parts of the questionnaire could contain crosses.

In the following graphic you can see a questionnaire, for which a survey has not yet been created. It is as such, not in the recognition set of the VividForms Reader (red cross).

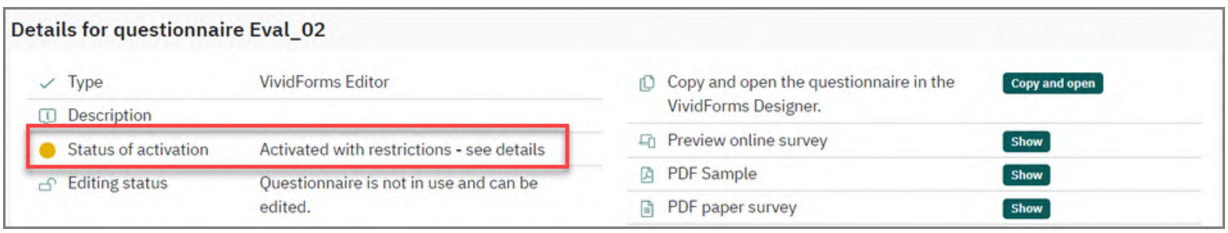


Figure 85: Questionnaire Details: Recognition Set of the VividForms Reader

Now if you create a survey with this questionnaire or click on [Add], the form definition file is created and added to the recognition set of the VividForms reader:

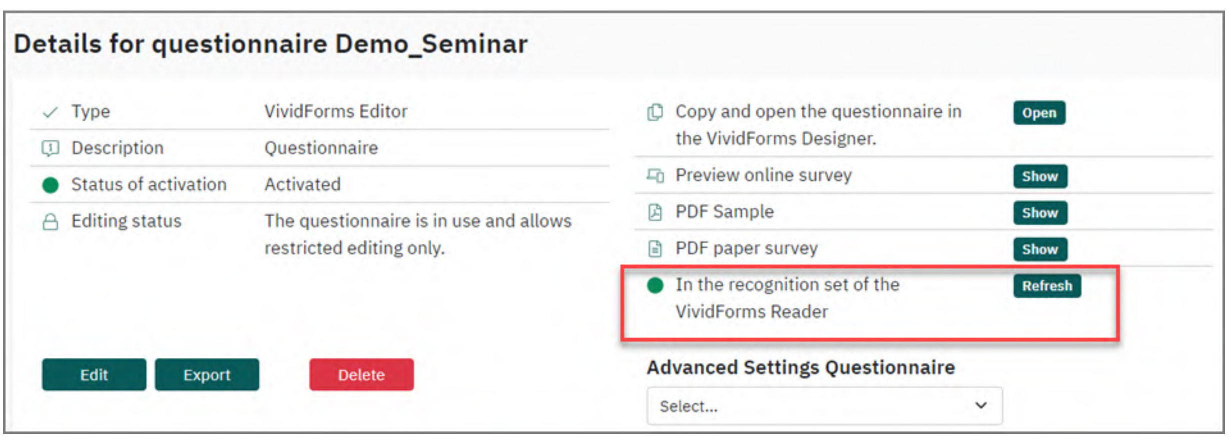


Figure 86: Questionnaire Details: Questionnaire is in the Recognition Set of the VividForms Reader

When moving evasys, for example to another disc drive or another computer, it can become necessary to refresh the recognition set of the VividForms Reader. (To be precise, this becomes a necessity as soon as the directory “forms”, which contains the recognition set, is moved. By default this directory is in …\Program Files\evasys\VividForms.) The reason for this is that the XML files contain file paths to servers which, after moving, may no longer be correct.

For this reason you have the possibility of reloading the form definition files created, by clicking on [Refresh] in the survey details under “In the recognition set of the VividForms Reader” (see figure above).

You also have the possibility of refreshing the entire recognition set. To do this, click in the questionnaire list in the area “VividForms Recognition Set” the [Refresh] button. By doing so, all existing questionnaires in the recognition set of the VividForms reader will be refreshed.

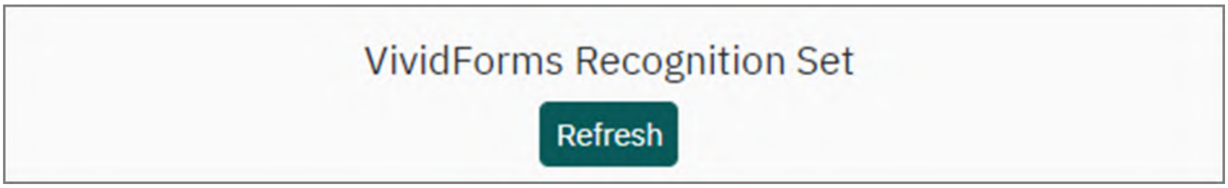


Figure 87: Refreshing the Recognition Set of the VividForms Reader in the List of Questionnaires

An active instructor can also refresh his forms, while s/he clicks on the Icon in the column “recognition set”:

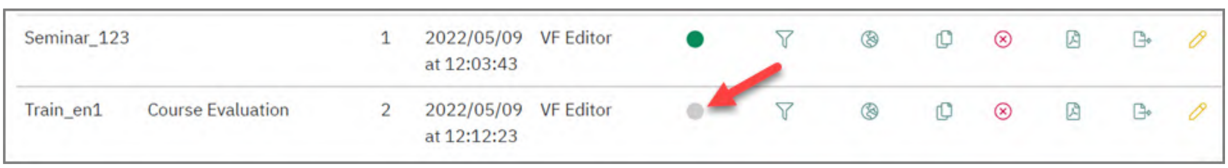


Figure 88: Refresh Recognition Set in the active Instructor's Account

Note:
Should you have any further questions regarding refreshing the recognition set of the VividForms Reader, please contact our support department, as this function is above all a feature for technicians in case of moving evasys.

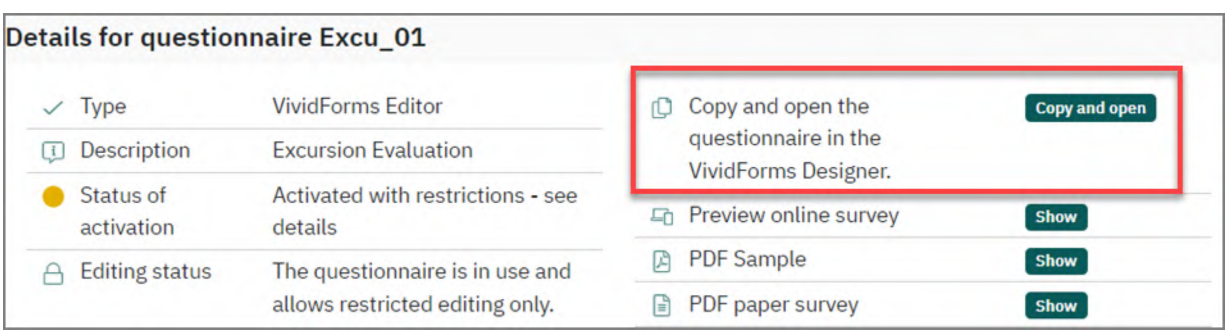


Figure 89: Copy and open the questionnaire in the VividForms Designer

The option “Copy and open the questionnaire in the VividForms Designer” offers you the opportunity to reorganize your existing VividForms Editor questionnaires in the designer. In order to edit your questionnaires in VividForms Designer, you require a corresponding license. For further information, please do not hesitate to contact us.

You can open a cover sheet questionnaire with the option “PDF paper survey”. As this already has a barcode, it can be printed out and used in a corresponding cover sheet survey. To open the questionnaire, click the option “Show”.

The preview of the questionnaire in an online survey can be opened with the option “Preview online survey”.

Below the information about the PDF files and the recognition set you can see a drop-down list with several options, moreover two buttons and the [Delete] function.

The options in the section “**Advanced Settings**” have the following meaning (for all options you will first have to select the option from the drop-down list and then click the button [Edit]):

Text Templates

You can define custom email texts or texts for PDF reports in order to incorporate elements specific to a given questionnaire in reports or emails. You can also define email attachments for the questionnaire. Compare in detail chapter D 2.1. “Text Templates”.

Norming

This is where the norm data are defined for the questionnaire. In addition sub norms can be selected for, for example, subunit or course type level as well as displaying message boxes for interpretation. Compare in detail chapter B 6.1. “Norms”.

PDF Reports

Here you can define the default PDF report with which the questionnaire will be evaluated. Furthermore subvariations of the standard report can be created by suppressing parts of the questionnaire for a given feedback recipient. Additionally subgroup reports for single choice, multiple choice or matrix questions can be created. Compare in detail chapter B 4.7.9. “PDF Report Definitions”.

Quality Guidelines

This is where you can set the quality standards for the questionnaire. These standards are found again when using the QM views. QM views can, for example, be given to deans at the end of a survey period so that they have a clear overview of the results of their department. The quality guidelines should give an impression of the quality of a course so that, if necessary, a detailed report can be consulted. Compare in detail chapter B “The window with the details of the created percentile rank norm appears.”.

Report for Comparison

Here you can define the number of previous periods and comparative reports of the report creator which should be compared with the current PDF report. In addition, comparison lines can be freely defined on the basis of externally collected data via an input mask. Compare in detail chapter B 5.2.10. “Integrating Profile Comparison Lines in the PDF Report”.

Data Export Configuration

You can rename the variables and allocate new numerical values for the export of the questionnaire. Compare in detail chapter B 5.4. “Definition of the Export Values and Names for Variables”.

Filter Settings

This is where you define whether certain answers will cause other questions to be suppressed. In an online survey suppressed questions will not appear or will be inactive. For paper surveys filter settings apply after processing, i.e. retrospectively. In this way, the filters in the paper surveys have an effect on the report. Compare in detail chapter B 2.3.4. “Advanced questionnaire settings”.

Validation

By defining validations you can test entries to open questions and matrix fields in online surveys with value ranges and regular expressions before a survey participant can send the questionnaire. Compare in detail chapter B 2.3.4. “Advanced questionnaire settings”.

Required questions

Those questions of online surveys for which an answer is compulsory can be defined here. Compare in detail chapter B 2.3.4. “Advanced questionnaire settings”.

Cross Tabulations

The cross tabulations shown here will appear in the PDF report. Compare in detail chapter B 2.3.4. “Advanced questionnaire settings”.

Free Indicators

It is possible to define indicators freely so that questions of different question groups can also serve as a basis for calculating an indicator. In this way, the elements of an indicator can be freely allocated across the questionnaire. These so-called “free indicators” can be stored separately for each questionnaire and later displayed in the PDF report instead of the traditional indicators. Compare in detail chapter B 5.1.5. “Free Indicators”.

Languages

Different languages can be stored for questionnaires in online surveys, so that online survey participants can select questionnaires in different languages. With paper questionnaires you must create several questionnaires and surveys, whose results you can combine later in the Report Creator. Compare in detail chapter B 3.15.4. “Multiple Languages”.

In the section **“Questionnaire”** the following options are available:

Edit form

Opens the questionnaire to edit. The Editor or the Designer can be opened in this way, depending on the Engine. With VividForms Plus questionnaires, the window to the questionnaire settings is opened. Here you can change the wording of the questions and formats, as well as making analysis specifications for indicators.

Export

Creates a file from the questionnaire which can be saved and imported into a different evasys system. For VividForms Editor questionnaires a file in VFD format is created, for VividForms Designer questionnaires, a file in FRM format.

VFD files can be imported into an evasys system through the import interface (see above chapter B 2.3.2. "Questionnaire administration"). FRM files can be opened in VividForms Designer and processed and published here if required.

With VividForms Editor questionnaires, secondary questionnaire data can also be exported, if desired. The same setting options apply as when copying questionnaires (see above chapter B 2.3.2. "Questionnaire administration").

Delete form

Deletes the questionnaire and the survey data from the database. Therefore: Take care with ongoing surveys.

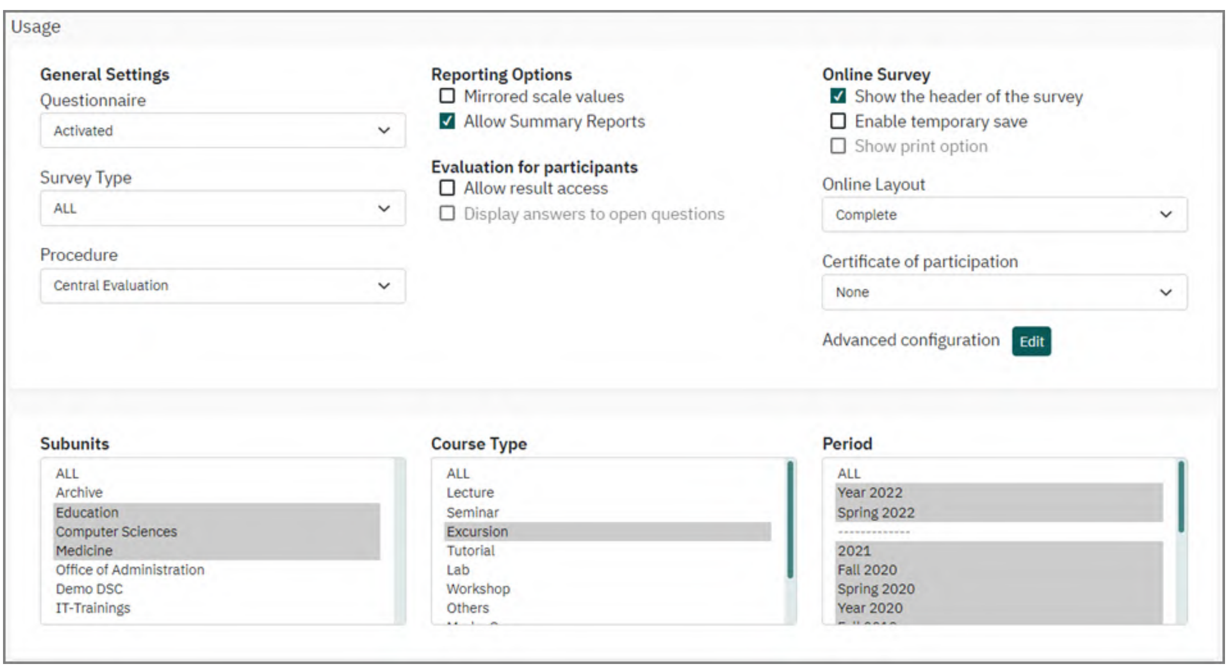


Figure 90: Questionnaire Details: Usage

Note:
You will not be able to then create report documents for surveys carried out with this questionnaire. You will be able to access the raw data though.

In the section “**Usage**” you can define the use of the questionnaire.

Note:
All changes performed in the section “Usage” must be saved at the end of the page with the button [Apply].

Form

Activated or deactivated. The latter is the “soft solution”. Existing surveys can still be analyzed and displayed but you will not be able to create any new surveys.

Survey Type

Either ALL, or Paper Surveys or only Online Surveys.

Procedure

Select “Central Evaluation” (only Administrators and Subunit Administrators can work with the questionnaire), “De central Evaluation” (only active Instructors/Trainers can work with the questionnaires), or “ALL” (everyone can work with the questionnaires). “Central Evaluation” is preset as default.

Reporting Options

- Mirrored scale values

  The option “mirrored scale values” allows the mirroring of the raw data which is linked to a survey. This has an effect on the calculation of the average and the median.

  The standard scale in evasys goes from 1 to n from left to right. Mirrored values will have a highest option on the left. All raw data, including averages and medians, will be affected by this.

Note:
The mirrored scale values only affect the raw data, the averages and the medians. That means that they for example do not affect the calculation of the quality guidelines. Thus you have to define the quality guidelines on the basis of the internal scale values. Please remember that the standard internal scale in evasys goes from 1 to n from left to right.

- Allow Summary Reports

  Defines whether summary reports (dean of studies report, dean report) can be created for this questionnaire.

Evaluation for Participants

For online surveys you can grant the participants access to the results of the survey. After the survey has been closed, participants can use their PSWD to have a look at the HTML report.

You can decide if answers to open questions are to be displayed or not.

Online survey

- Display survey header

  Here you can decide whether in online surveys, the survey header should be displayed. Should you display it, the survey appears as follows:

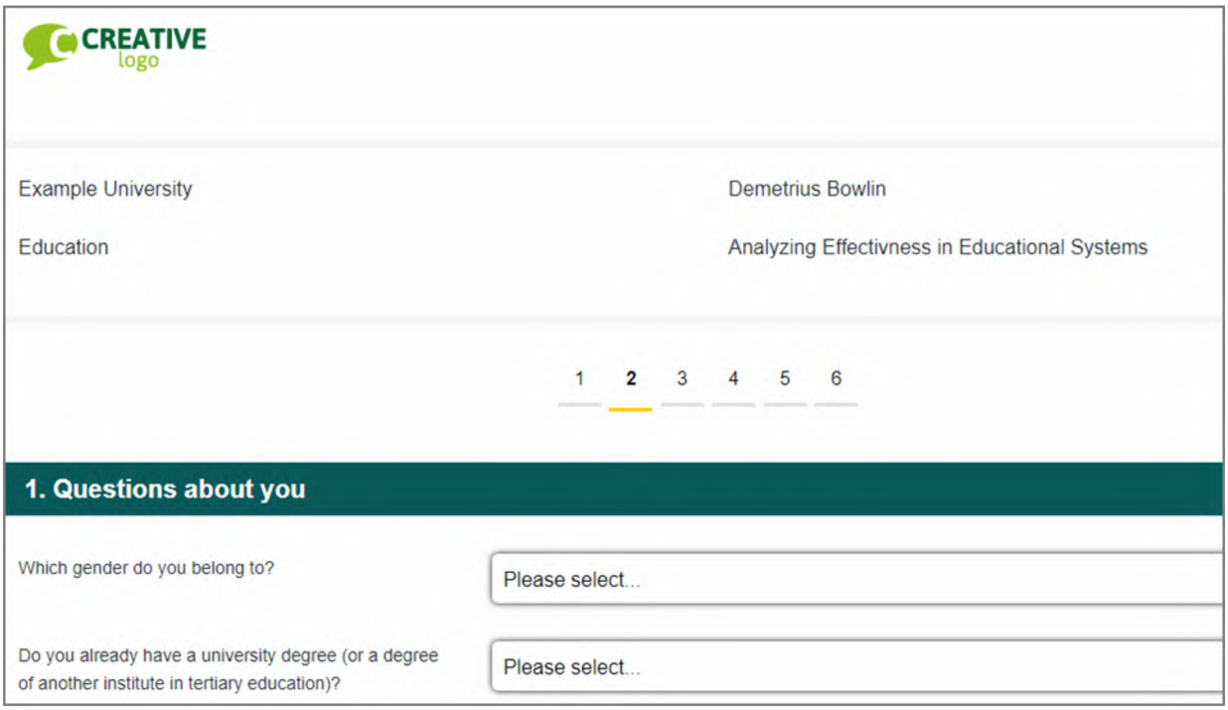


Figure 91: Online Survey with an Activated Survey Header

  Should you decide to display it not, the header with the information about the course disappears and the survey appears as follows:

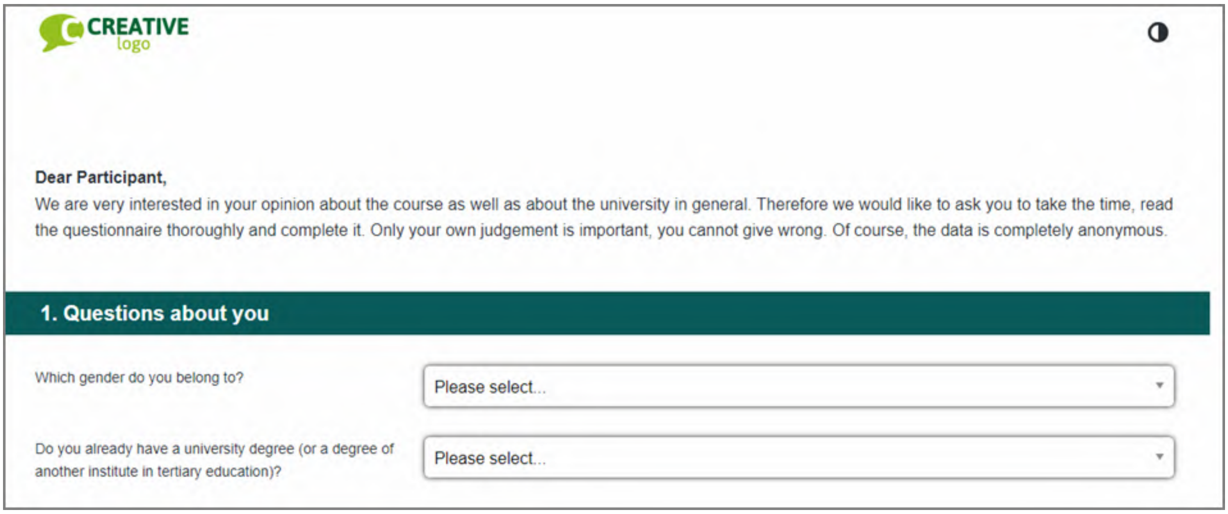


Figure 92: Online Survey with a Deactivated Survey Header

- Temporary save/Print Options

  You can also choose to enable the temporary save and print options.

- Design

Here, you can define whether the questionnaire is displayed in online surveys as one page (i.e. to scroll down; option “Complete”), to browse (option “Per Chapter”) or according to the page display in the VividForms Editor resp. Designer (option “Per Page”). With the option “Per Chapter” each question group is displayed in online surveys as one page.

- Certificate of Participation

Note:
For online surveys, the display mode “per chapter” has been set as default.

If the survey participants need to receive a certificate of participation, this option can be activated. The options allow the display of a PDF document, the submission of an email (only available if the PSWDs were sent by email), or both. The certificates will be generated as soon as a participant has completed a survey.

The text of the email can be edited via the menu “Text Templates”, option “E-Mail: Certificate of participation for online surveys”. If you want to display a PDF certificate in the browser directly after the participants have submitted the questionnaire you first have to take the following steps:

- Create a PDF template resp. choose the sample template “Certificate for participation in online surveys” from the menu “System Information/Sample files”
- Upload the PDF template in the menu “Documents”, area “PDF templates”
- Attach the PDF template to the text template “PDF: Certificate for participation in online surveys” in the menu “System Settings/Text Templates” (global) resp. in the details of a questionnaire, menu “Advanced Settings/Text Templates” (per

questionnaire).

In case of using online surveys you have the possibility to permit your participants, after closing an online survey, to look at the results report with their PSWD (HTML-Report). You can decide if you permit the access to open questions too.

Advanced Configuration

Participants of online surveys, who submit their survey, can be directed to a specific internet site. Here, an optional password can be conveyed which ensures that the page to be accessed can only be reached by those people who have actually taken part in an online survey. In this way, incentives to increase response rates, such as raffling prizes or the like, can be implemented without the risk of abuse from unauthorized people.

To activate questionnaire specific forwarding, click on the [Edit] button. The window for questionnaire specific forwarding for online surveys opens automatically.

Here you can:

- deactivate the questionnaire specific forwarding. In this case, the setting in the menu “System Settings/evasys Settings/Survey Online/Alternative forwarding for online surveys” is applicable. If no forwarding is activated at all, the default end page will be shown.
- activate the questionnaire controlled specific forwarding and enter a questionnaire specific address (please observe the format of the URL: http://www.example.com). As a password, you can either define your own secret word or use a predefined one, which can be defined in the “System Settings” and which consists of information from the course, e.g. a combination of the user data field and the survey ID (“System Settings/evasys Settings/Survey Online/Alternative forwarding including authentication“).

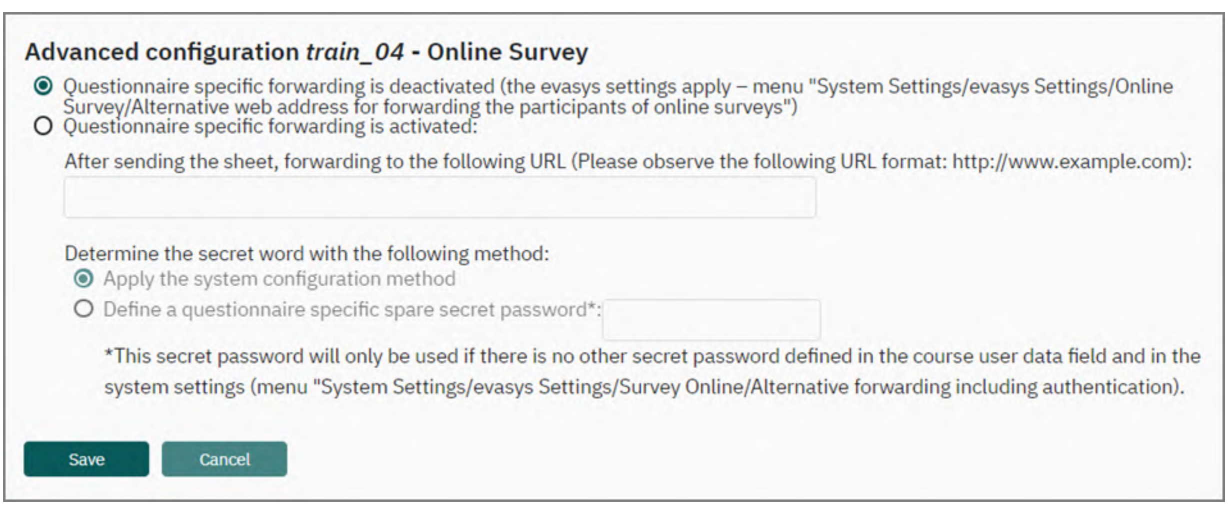


Figure 93: Define Forwarding

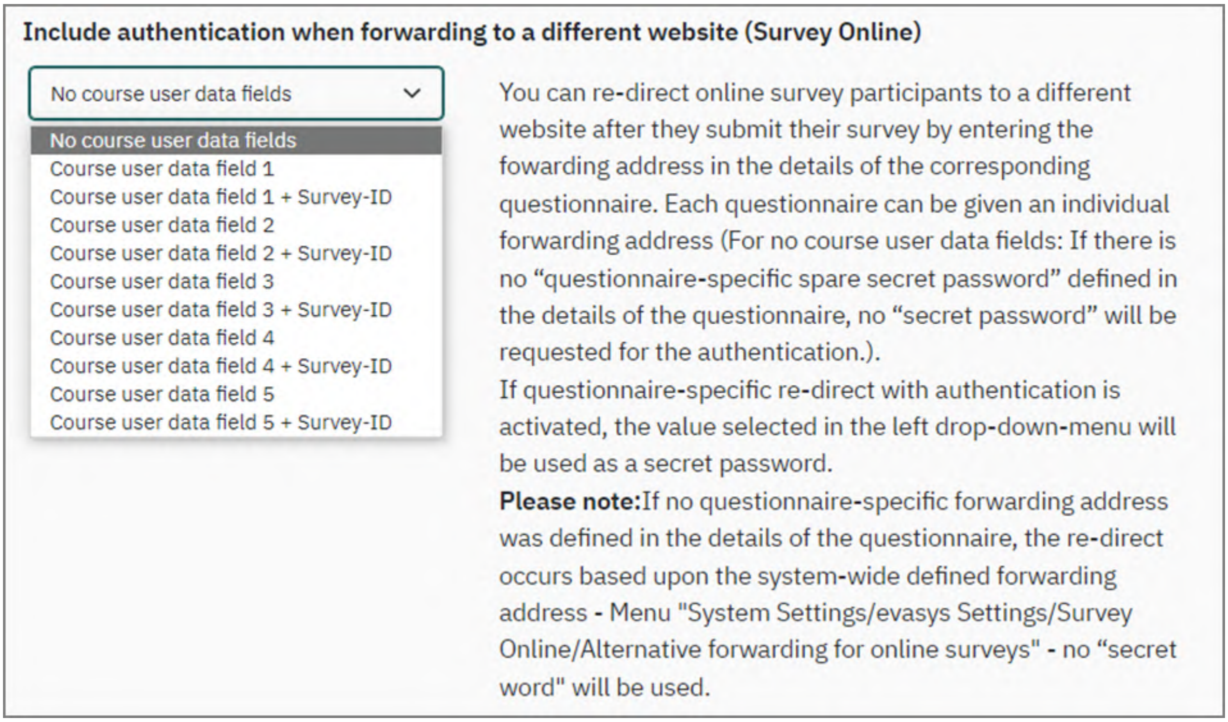


Figure 94: Define a Password in the System Settings

Note:
Please note that the list of surveys available for a participant will not be displayed when alternative forwarding is activated.

Subunits

Select a subunit for which the questionnaire should be available.

Course Type

Select one or more different types of course for which the questionnaire is permitted.

Period

Give the periods for which the questionnaire can be used.

2.3.4. Advanced questionnaire settings

Several advanced questionnaire settings can be directly undertaken when saving the questionnaire in VividForms Editor or at a later point in the questionnaire details. These include the filter settings and the creation of plausibility checks, required questions, and cross tabulation.

Filter Settings

With the definition of filter settings, questions and elements of the form can be hidden or disabled which, under certain conditions, are not relevant to the survey participant. These conditions can be defined in single choice, multiple choice or scaled questions.

In paper surveys these questions can still be answered and scanned. Subsequently, the filtered answers are deleted from the database of the survey. In online surveys, the filter acts directly in the survey. Filtered questions cannot be answered and/or hidden elements cannot be seen.

Fundamentally, questions and elements can assume three states: deactivated & gray, deactivated & hidden, activated and visible.

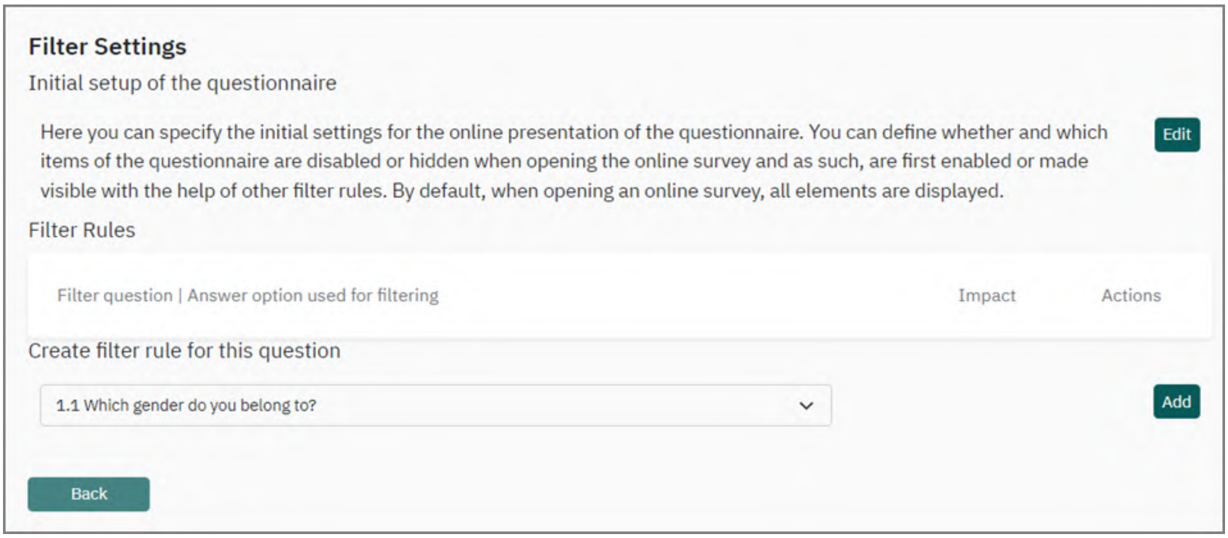


Figure 95: Filter Settings

In the section "**Initial Setup of the Questionnaire**" the initial state of the questions is set. By default, all questions are activated and displayed. If individual questions or answer options are only to become visible after a combination of answers, you can select the questions/answers with the help of check boxes.

For reasons of clarity, answer options are not available for selection by default. You first have to activate the check box „Show answer options" in the upper right corner.

Select the question groups, questions and/or answer options you wish to disable and hide or disable and deactivate right from the beginning and select the desired status with the help of the drop-down-menu. Click on [Save]. If you click on [Back] you get back to the main page of the filter settings.

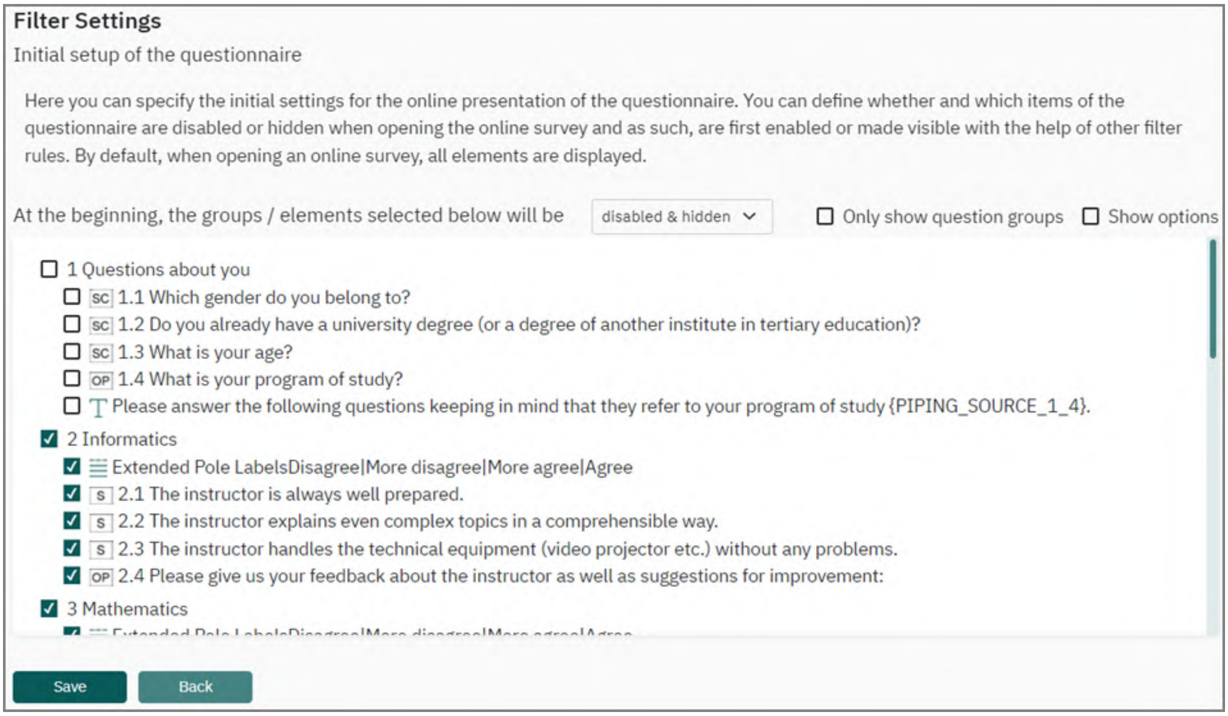


Figure 96: Initial setup of the Questionnaire

In the section “**Filter Rules**” all existing filters are displayed in the filter settings and can be edited later if required. To add new filter rules, select the desired filter question from the list of questions.

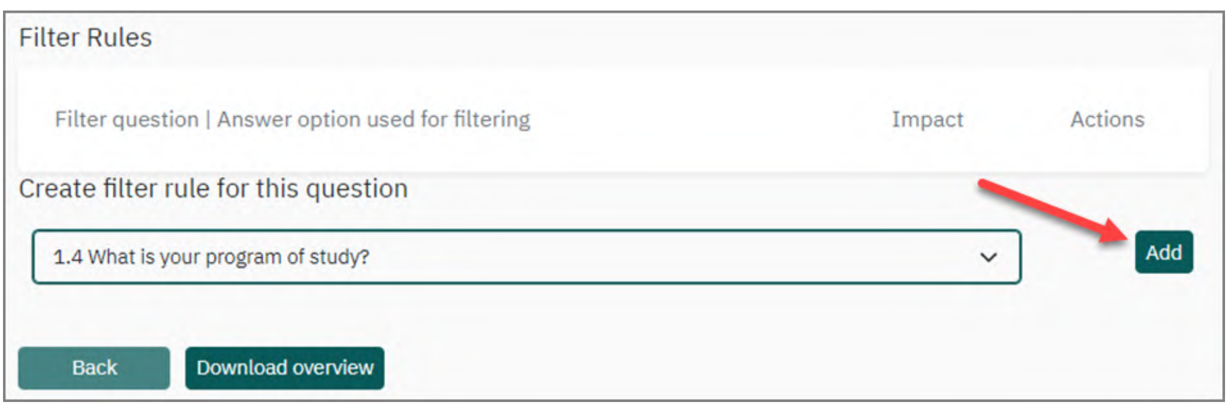


Figure 97: Filter Rules - Adding a Question

With a click on [Add], the filter setting screen opens.

In the upper section is the question to which the filter is to be applied. In the next section, one or more answer options are selected that require the filter. In the bottom section, all elements of the form whose state is to be affected by the filter are clicked. The required question state is determined via the selection list.

In the case of **closed questions** such as single choice, multiple choice or scaled questions, the desired answer options can be selected. In the section below, all elements are selected which should be shown or hidden by the filter. By using the drop-down list, it can be determined whether the elements are disabled and grey, disabled and hidden or enabled and visible.

The example below shows a single-choice question "I have already been in the refectory. If the value "No" is selected, the following questions about the cafeteria are hidden for the survey participant. In the initial setting of the questionnaire, this question must first be enabled and visible.

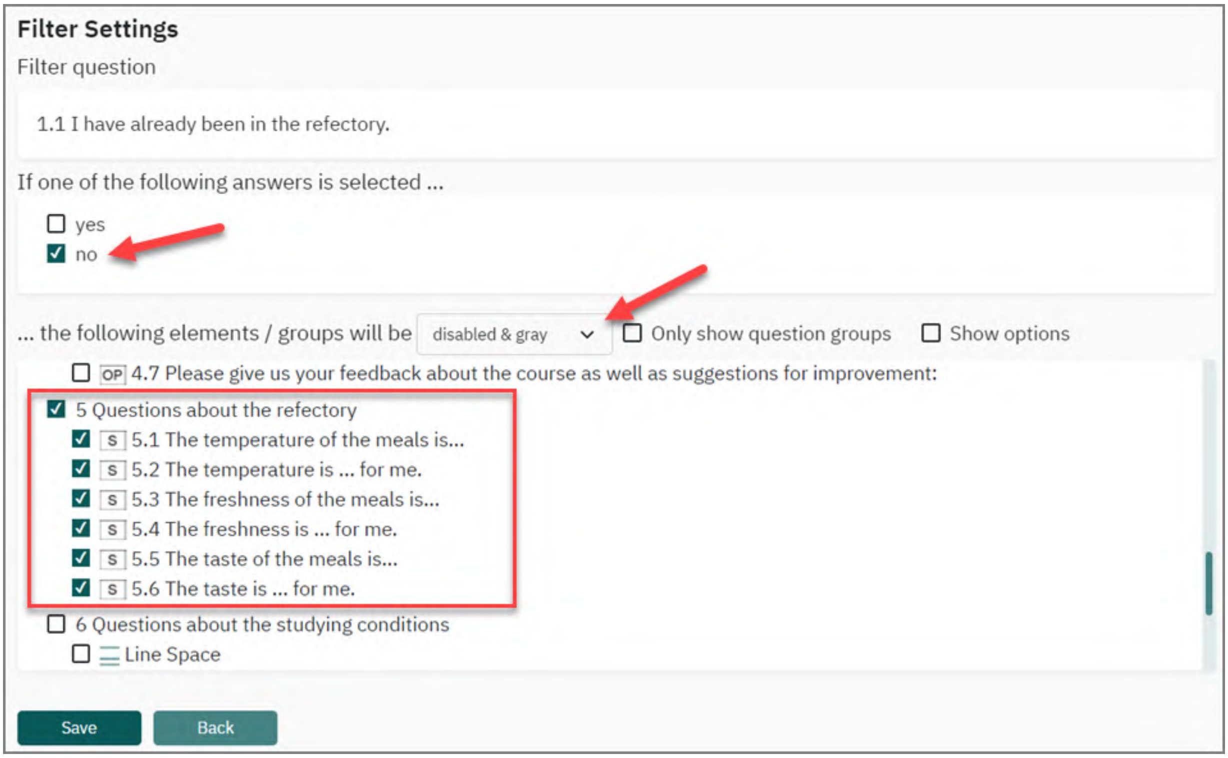


Figure 98: Filter Rules - Choose Questions

In the following example you can see a single-choice-question „Which type of course did you attend?“. Depending on the answer (Digital course, face-to-face course, combined course) only specific answer options of the following multiple-choice-question should be available for selection. In this case you have to create three filter rules for the three answers and define, which answers should be activated and visible. The figure below shows an example of the option „Digital Course“:

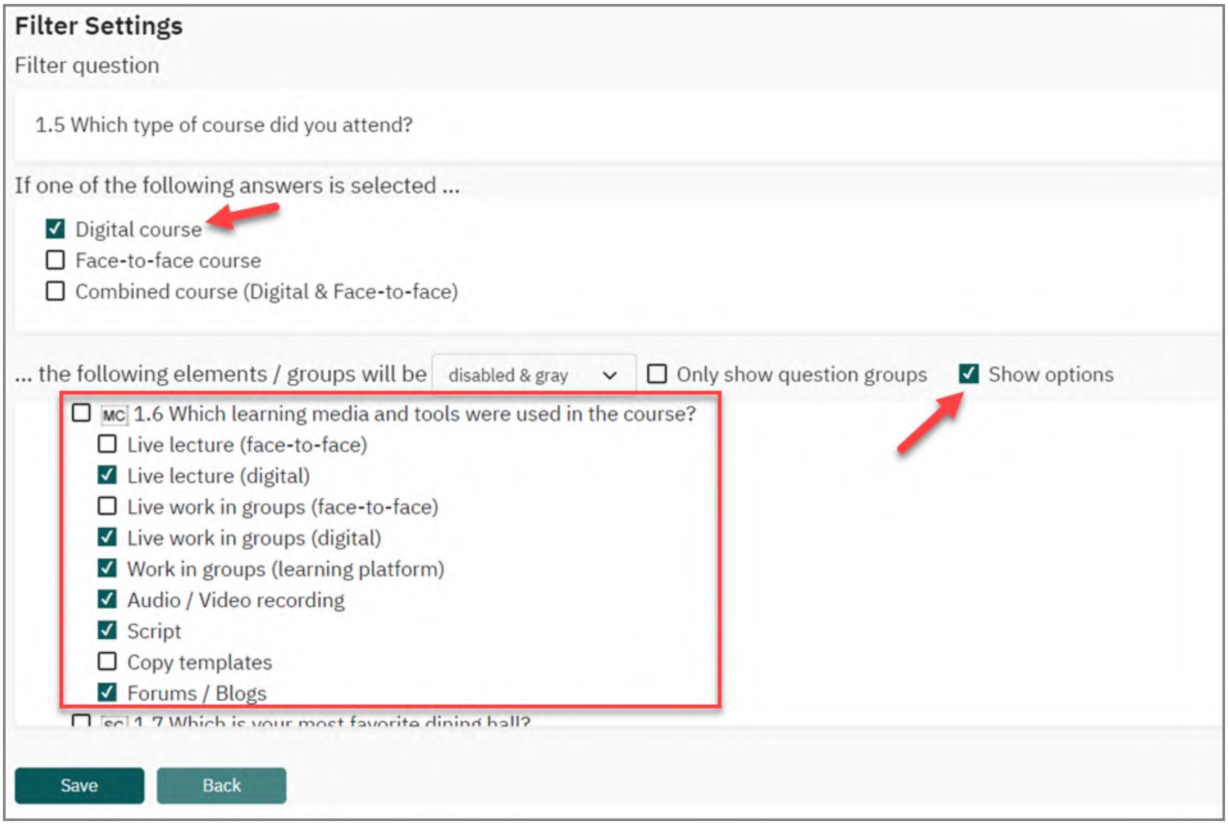


Figure 99: Filtering single answer options

The following screenshot shows the question in an online survey when selecting the answer Digital course:

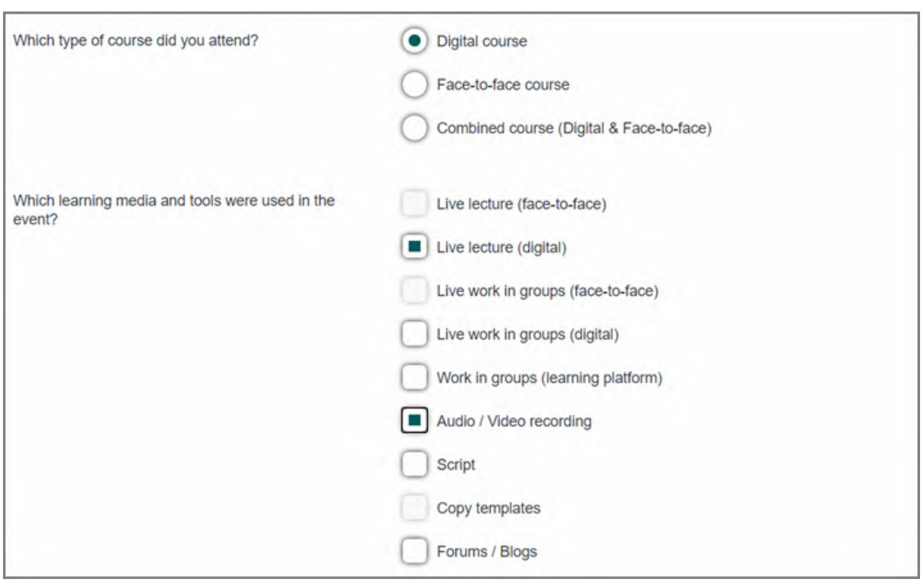


Figure 100: Question in the online survey

In the case of **open questions**, enter the freely definable answer text on which the filter is based. You can specify whether the text entered here must exactly match the participant's answer (“is equal“), if the answer begins with the text defined here ("begins with"), or if the answer contains the text anywhere ("contains"). Upper and lower case are not relevant.

The example below shows a question which asks for the program of study of the participants. If the answer "Informatics" is entered by the participants, the questions related to informatics are displayed, i.e. enabled and visible. These questions must first have been hidden in the initial settings.

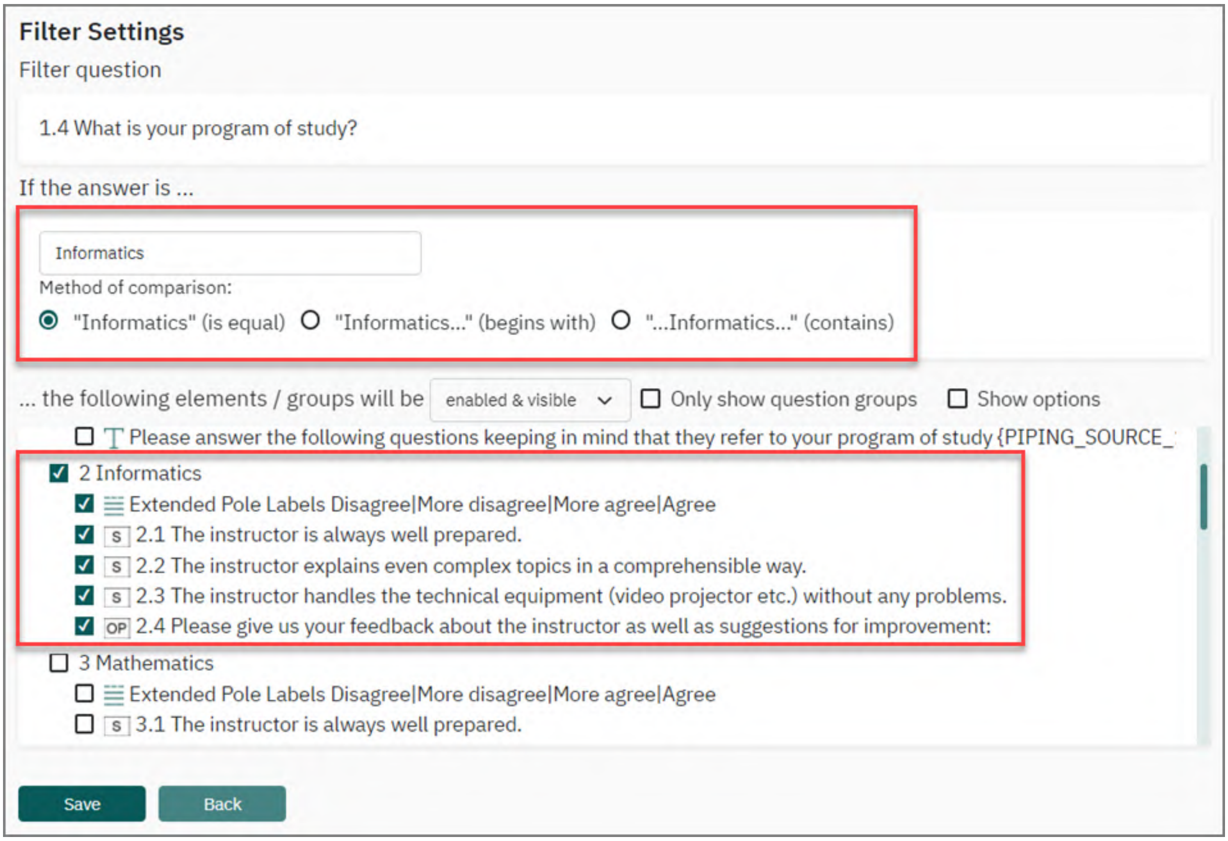


Figure 101: Filter Settings - Example Open Question

Click [Save] to save the filter settings. Click [Back] if you want to cancel the settings and get back to the filter overview.

In the filter list, the new rule has been added and can now via action icons be edited (pencil icon) or deleted (Red Cross). With [add], more filter rules can be entered.

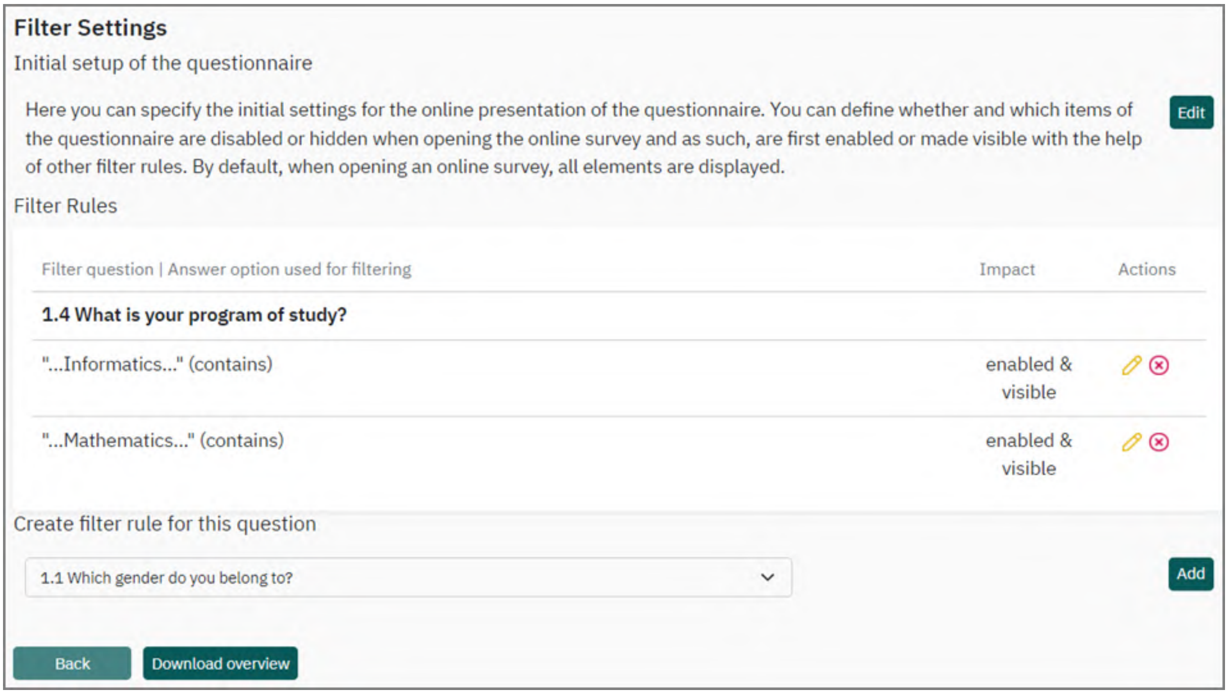
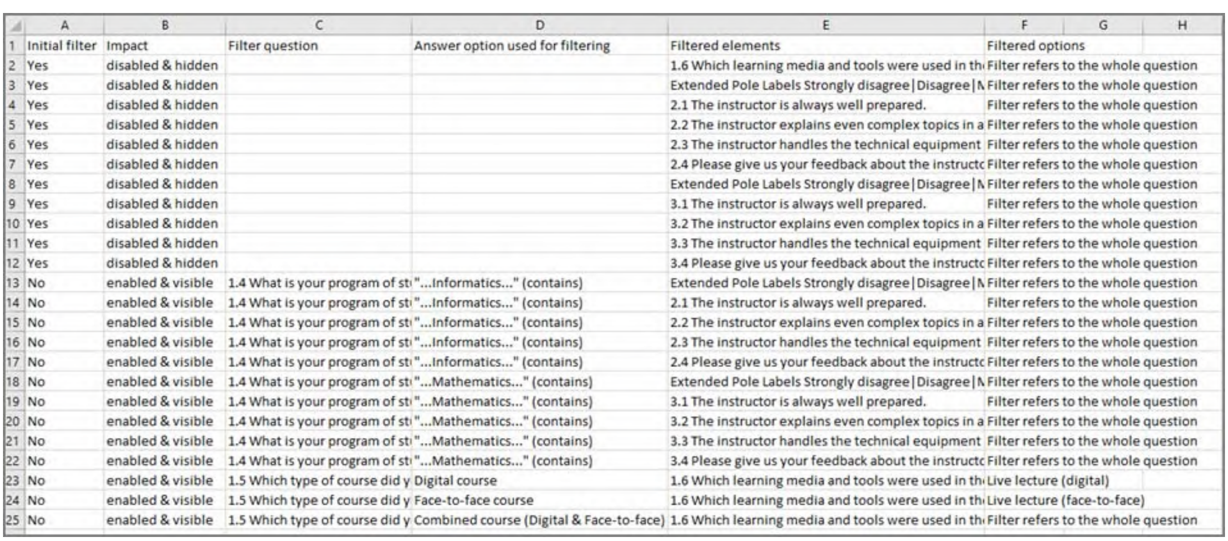


Figure 102: Filter Rules - Overview of the Defined Filter Rules

If you click [Download overview] you will receive a tabular overview of the defined filter rules in the format of a CSV file. The first column "Initial filter" indicates whether it is a filter in the initial setup of the questionnaire (value Yes) or not. The following columns show the effect of the filter, the filter question, the answer on which the filter is based, and the filtered questions, elements and answer options. The table is sorted in descending order according to the filter question, with the initial filters being displayed first. Very long question texts and filter texts are limited to a length of up to 120 characters.



	A	B	C	D	E	F	G	H
1	Initial filter	Impact	Filter question	Answer option used for filtering	Filtered elements	Filtered options		
2	Yes	disabled & hidden			1.6 Which learning media and tools were used in th	Filter refers to the whole question		
3	Yes	disabled & hidden			Extended Pole Labels Strongly disagree|Disagree|N	Filter refers to the whole question		
4	Yes	disabled & hidden			2.1 The instructor is always well prepared.	Filter refers to the whole question		
5	Yes	disabled & hidden			2.2 The instructor explains even complex topics in a	Filter refers to the whole question		
6	Yes	disabled & hidden			2.3 The instructor handles the technical equipment	Filter refers to the whole question		
7	Yes	disabled & hidden			2.4 Please give us your feedback about the instructo	Filter refers to the whole question		
8	Yes	disabled & hidden			Extended Pole Labels Strongly disagree|Disagree|N	Filter refers to the whole question		
9	Yes	disabled & hidden			3.1 The instructor is always well prepared.	Filter refers to the whole question		
10	Yes	disabled & hidden			3.2 The instructor explains even complex topics in a	Filter refers to the whole question		
11	Yes	disabled & hidden			3.3 The instructor handles the technical equipment	Filter refers to the whole question		
12	Yes	disabled & hidden			3.4 Please give us your feedback about the instructo	Filter refers to the whole question		
13	No	enabled & visible	1.4 What is your program of st	"...Informatics..." (contains)	Extended Pole Labels Strongly disagree|Disagree|N	Filter refers to the whole question		
14	No	enabled & visible	1.4 What is your program of st	"...Informatics..." (contains)	2.1 The instructor is always well prepared.	Filter refers to the whole question		
15	No	enabled & visible	1.4 What is your program of st	"...Informatics..." (contains)	2.2 The instructor explains even complex topics in a	Filter refers to the whole question		
16	No	enabled & visible	1.4 What is your program of st	"...Informatics..." (contains)	2.3 The instructor handles the technical equipment	Filter refers to the whole question		
17	No	enabled & visible	1.4 What is your program of st	"...Informatics..." (contains)	2.4 Please give us your feedback about the instructo	Filter refers to the whole question		
18	No	enabled & visible	1.4 What is your program of st	"...Mathematics..." (contains)	Extended Pole Labels Strongly disagree|Disagree|N	Filter refers to the whole question		
19	No	enabled & visible	1.4 What is your program of st	"...Mathematics..." (contains)	3.1 The instructor is always well prepared.	Filter refers to the whole question		
20	No	enabled & visible	1.4 What is your program of st	"...Mathematics..." (contains)	3.2 The instructor explains even complex topics in a	Filter refers to the whole question		
21	No	enabled & visible	1.4 What is your program of st	"...Mathematics..." (contains)	3.3 The instructor handles the technical equipment	Filter refers to the whole question		
22	No	enabled & visible	1.4 What is your program of st	"...Mathematics..." (contains)	3.4 Please give us your feedback about the instructo	Filter refers to the whole question		
23	No	enabled & visible	1.5 Which type of course did y	Digital course	1.6 Which learning media and tools were used in th	Live lecture (digital)		
24	No	enabled & visible	1.5 Which type of course did y	Face-to-face course	1.6 Which learning media and tools were used in th	Live lecture (face-to-face)		
25	No	enabled & visible	1.5 Which type of course did y	Combined course (Digital & Face-to-face)	1.6 Which learning media and tools were used in th	Filter refers to the whole question		

Figure 103: Filter Settings - Overview CSV File

Visibility of filter rules

The usage of filter rules can also be made visible in the raw data of the survey. To do this, select the option "Mark filter question in raw data export (CSV)" in the configuration under "System Settings/evasys settings/Data Import and Export":

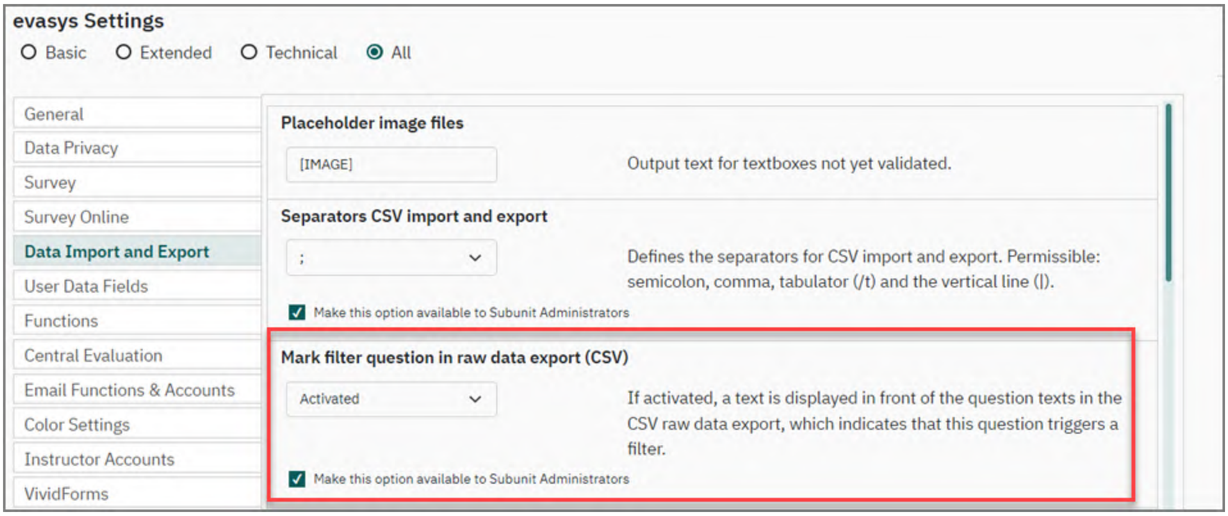
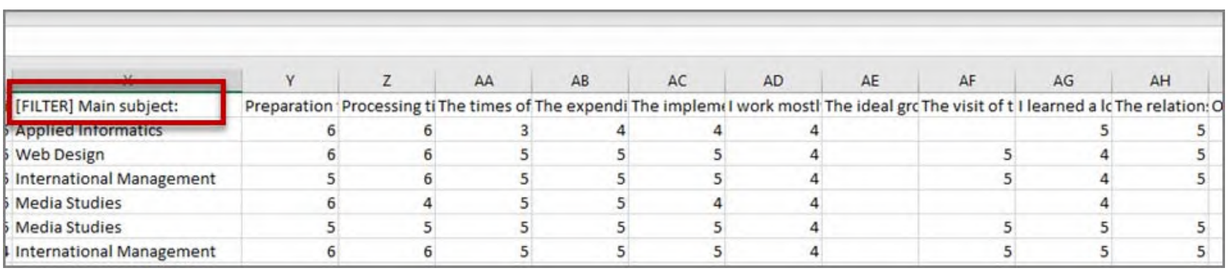


Figure 104: Setting option Mark filter question in raw data export (CSV)

If this function is activated, the word [FILTER] is shown in square brackets in front of the filter question:



X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
[FILTER] Main subject:	Preparation	Processing ti	The times of	The expendi	The impleme	I work mostl	The ideal grc	The visit of t	I learned a lc	The relation: O
Applied Informatics	6	6	3	4	4	4			5	5
Web Design	6	6	5	5	5	4		5	4	5
International Management	5	6	5	5	5	4		5	4	5
Media Studies	6	4	5	5	4	4			4	
Media Studies	5	5	5	5	5	4		5	5	5
International Management	6	6	5	5	5	4		5	5	5

Figure 105: CSV file with label for filter

Questions which are the basis for filter rules are marked with a small filter icon next to the question text:

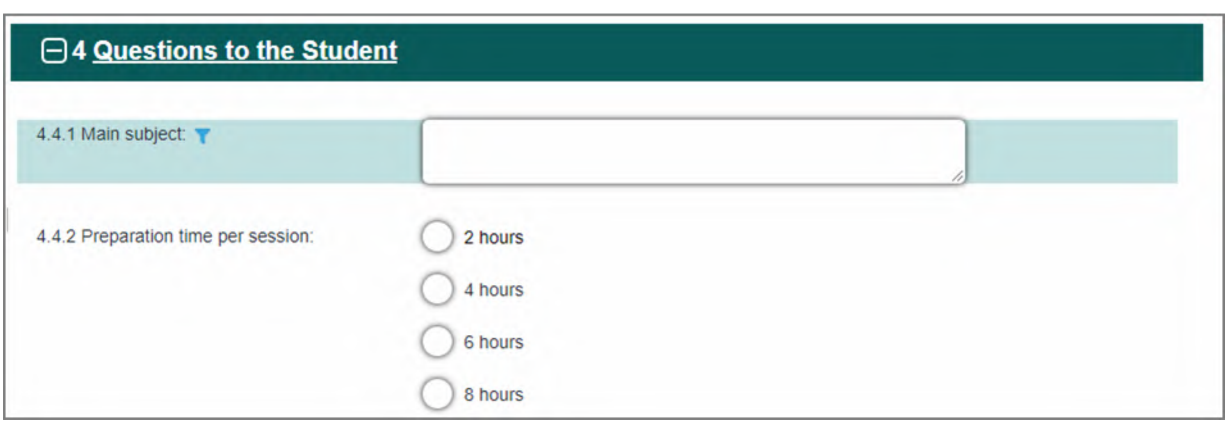


Figure 106: Filter icon in the editor view

Filter rules are also highlighted in the PDF report. A note in brackets appears below the question text informing the reader of the report that the answers are the result of triggering a filter for one of the previous questions. This indication is intended to prevent possible irritations, as there may be a significantly lower number of responses for a filtered question.

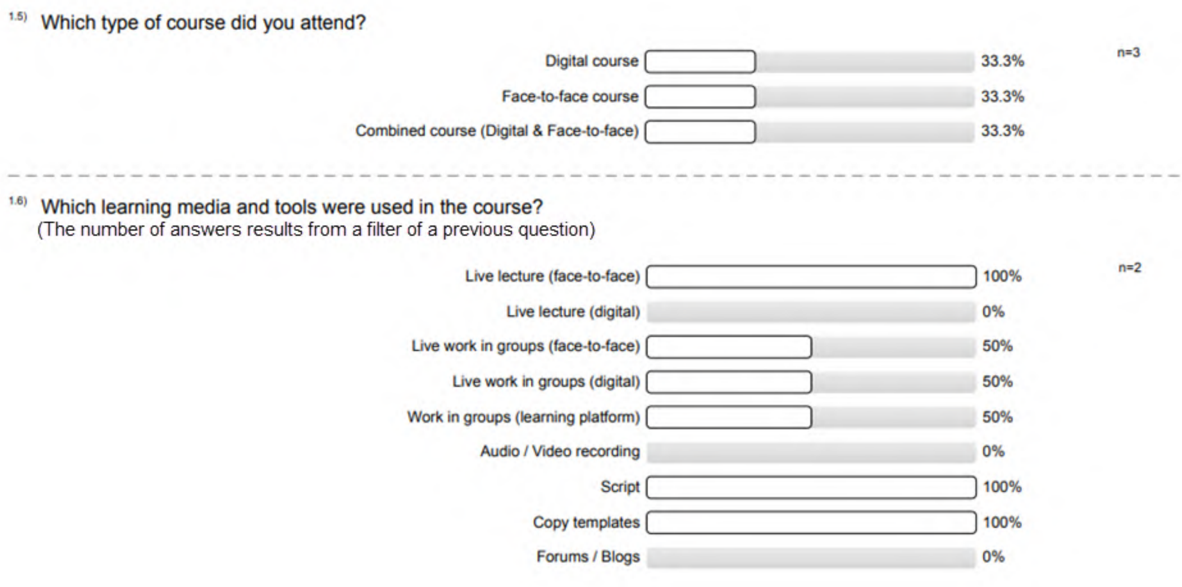


Figure 107: Question with information text on filtering

The displayed text is a text template and can be edited globally in the main menu "System Settings" as well as on questionnaire level in the details of a questionnaire. The relevant text template can be found in the section "PDF report texts" and is called "Information text for filtered questions".

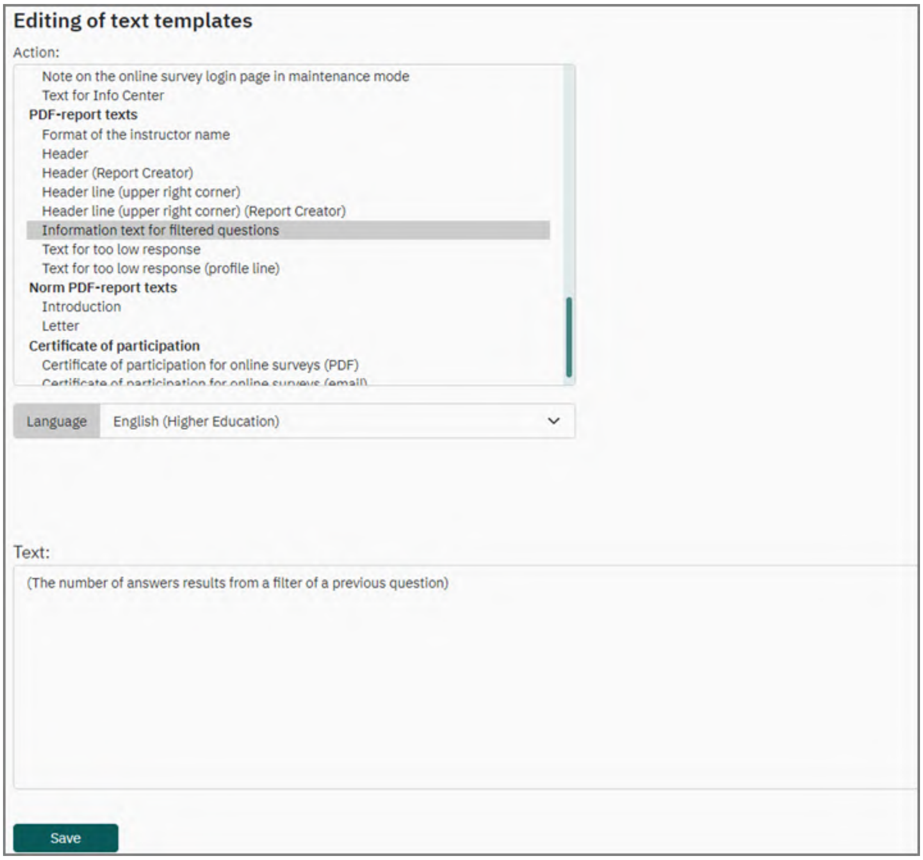


Figure 108: Text Template „Information text for filtered questions“

For detailed information on editing global as well as questionnaire-specific text templates, please refer to chapter D 2.1. "Text Templates".

Question-and-answer Piping

With the help of question-and-answer piping, participants in online surveys can be guided through the survey even more individually by including their answers in subsequent questions, answer options or free texts. In this way, participants can be addressed precisely and questions can be further specified.

Example: You ask your students about their favorite dining hall with the help of an open or closed question. The answer given, e.g. "Lakeside Terrace", can be inserted into the question text using placeholders, for example: "What makes Lakeside Terrace your favorite lunch place?".

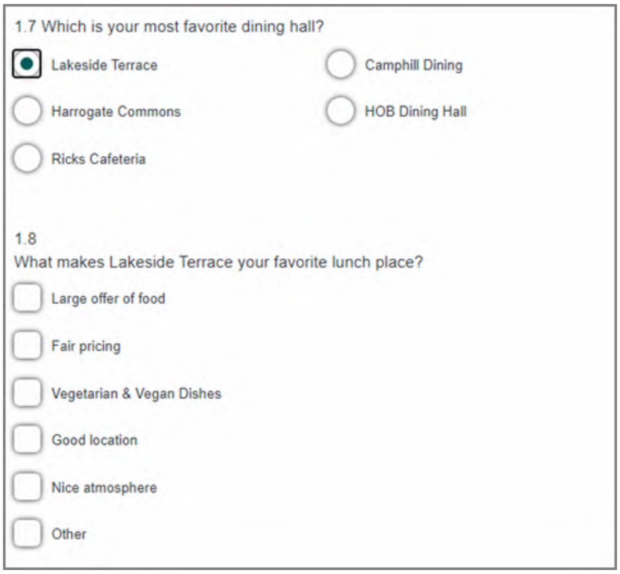


Figure 109: Piping Sample Question

In contrast to the filter rules, the piping is set directly in the questionnaire editor. You can use placeholders to display the texts dynamically.

For question-answer piping you need sender and receiver questions. Sender questions provide the content for the placeholder. The following questions can be used as sender questions:

- Open questions
- Segmented open questions
- Single choice questions
- Matrix questions
- Grade value questions

The question texts and answer options of all question types can serve as receiver questions. In addition, free texts can also work as receiver elements.

In order to insert answers from a previous question into a subsequent text, use the placeholder {PIPING_SOURCE_X_Y}. Instead of X_Y, the question number must be entered. Enter {PIPING_SOURCE_1_7} if you want to refer to question 1.7. The following figure shows the above example in the editing view:

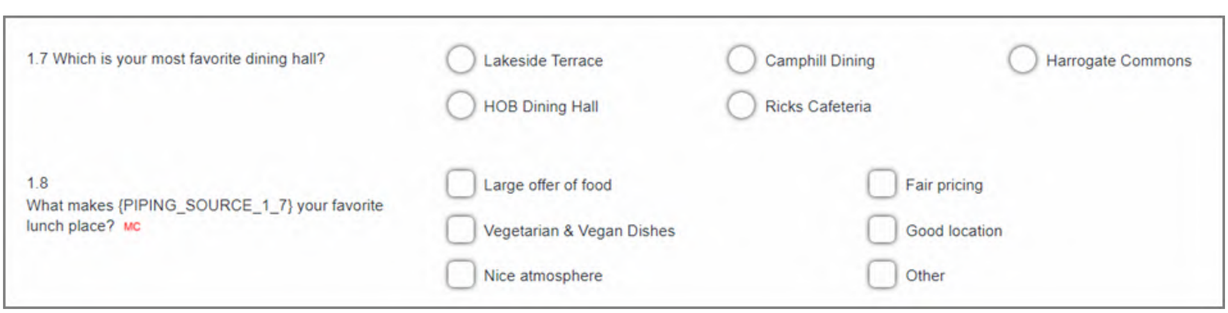


Figure 110: Placeholder in the question text

The placeholder is automatically replaced in the online survey as soon as the participants select an answer or enter a text for an open question. As long as no answer has been given, three points are displayed instead of the text:

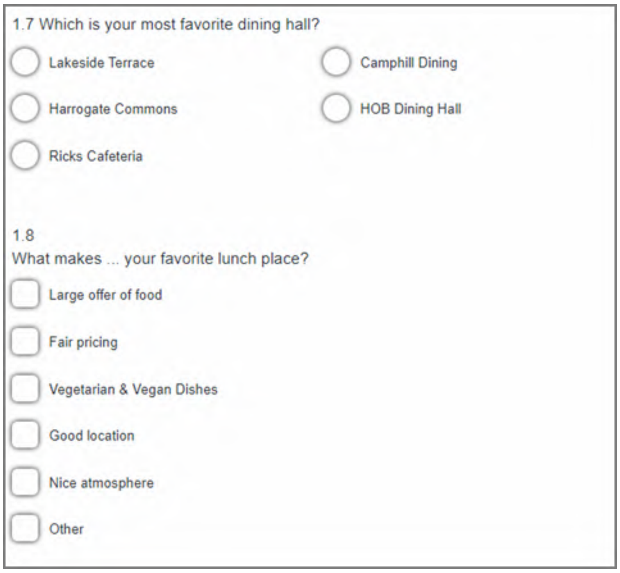


Figure 111: Placeholder substitute in online survey

Tip:
Combine question-and-answer piping with filters and initially hide the following question, which contains the piping placeholder, in the basic settings. In this way, the right content is immediately displayed for the participants.

In the following you can see two further examples for the use of the placeholders in combination with open questions as well as in answers:

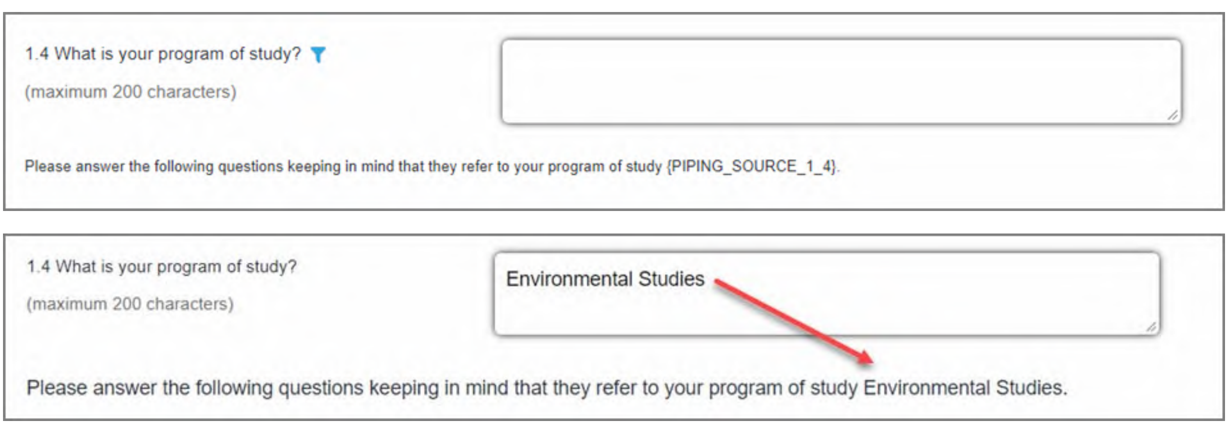


Figure 112: Piping in open questions

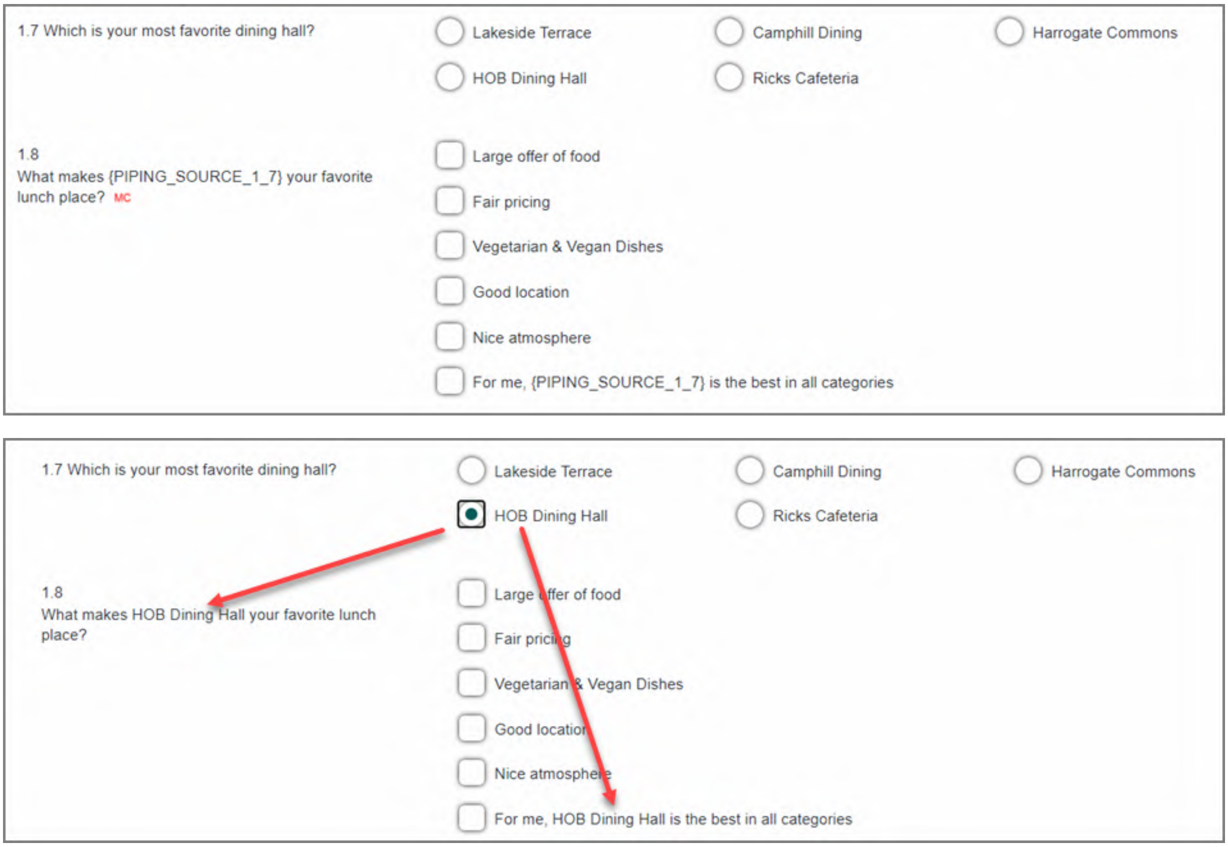


Figure 113: Piping in answer options

If you use question-answer piping, please note the following important notes:

- When using **predefined optional questions**, there is a risk of shifts and thus incorrect referencing if the optional questions are before the sender questions, as the question number changes if the answer is not given. On questionnaires with predefined optional questions, piping may only be used **after** these questions.
- For **module surveys**, piping is only possible within a module part questionnaire, i.e. it cannot be referenced across several questionnaires.

Please also note that the piping placeholders cannot be replaced in the reports (PDF and HTML report) or in the raw data, i.e. they are displayed here, similar to the editor editing view.

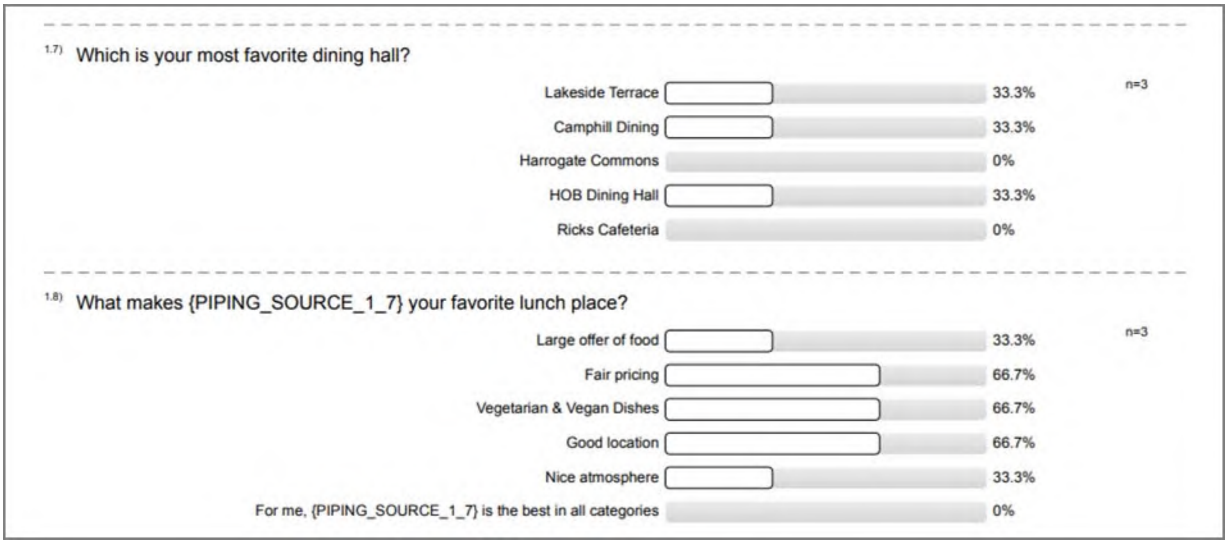


Figure 114: Piping in the PDF report

Validation

Validations are useful in online surveys only. By defining validations you can test entries to open questions and matrix fields in online surveys with value ranges and regular expressions before a survey participant can send the questionnaire.

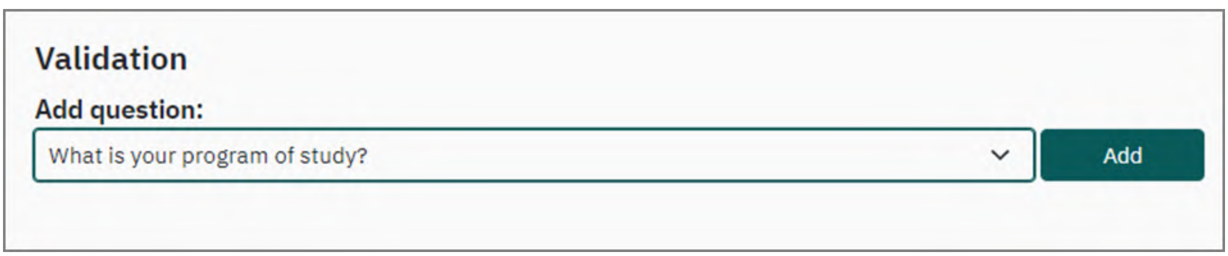


Figure 115: Validation

To create validations select a matrix field or an open question from the list and click on [Add]. Now select which values can be accepted:

- Numbers only – Here you can delimit the value range by storing a minimum and maximum value.
- Letters only – i.e. no blanks
- Letters or numbers only.
- Date.
- Pattern (simplified syntax) – By default, the following templates are available:
  - three-digit number,
  - word (underscore) number,
  - serial number.

  All three examples are based on the following legend:

    - L = Letter

- W = Word
- D = Digit
- N = Number
- A = Alphanumeric (= digit or letter)

In addition, there is the possibility of using square brackets to label a placeholder as optional. In this way, the following pattern: D[D][D]-W means that only input consisting of a number of one to three digits, a hyphen and a word (in this order), will be accepted.

As well as the common syntax for patterns, there is also the possibility of using regular expressions (on the basis of Perl syntax) to formulate patterns. Regular expressions are often used to recognize patterns and offer a high level of flexibility.

- Pattern (regular expression) – The following template choices are available:
  - three-digit number,
  - word (underscore) number,
  - serial number (simple),
  - serial number (complex),
  - email address.

Note:
A question text should contain instructions for the correct completion of a validation question, so that the survey participant knows which input is admissible.

Required Questions

Questions for which an answer is compulsory can be configured as required questions. When submitting a questionnaire in an online survey the system checks if all required questions have been answered. If this is not the case, the survey cannot be submitted unless answers to the required questions have been given.

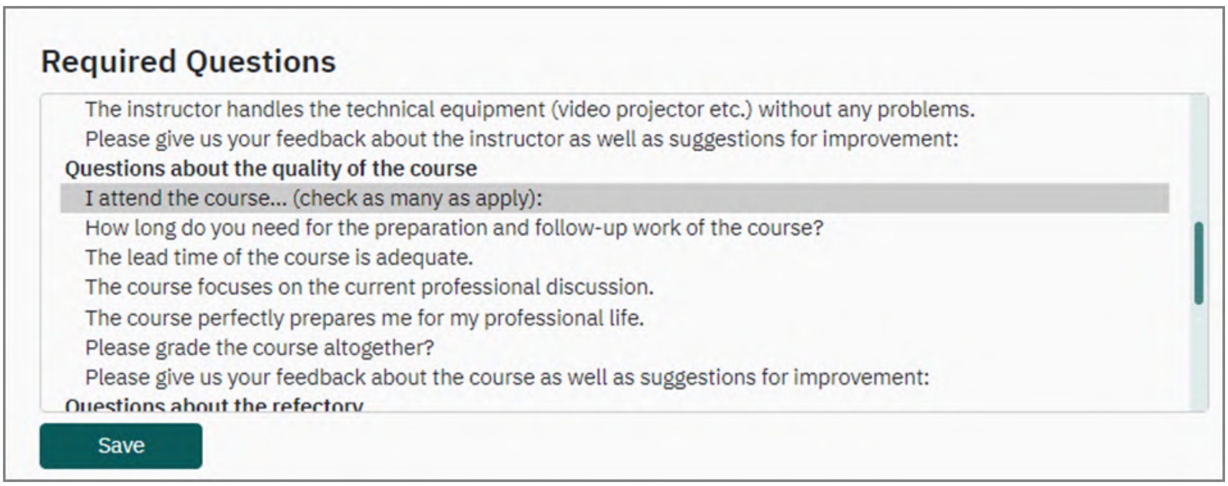


Figure 116: Configuration of Required Questions

To define the required questions select one (Click) or multiple (STRG+Click) questions and click on [Save]. The selected questions will be displayed with a blue background.

Note:
Unlike the filter settings, required questions are not recognized in paper surveys.

Cross Tabulations

In order to use cross tabulations for reports this function must be activated at “System Settings/Report Settings/Configuration/Create Cross Tabulation”.

Cross tabulations will then be shown in the PDF report, provided they have been defined for the questionnaire in advance. This can be done in two ways: Either directly in the VividForms Editor via “Settings/Validation, Required questions, Cross tabulations” or in the “Advanced settings” in the questionnaire details.

Figure 117: Create Cross Tabulations

In the selection list for question 1 and question 2 the single choice or scaled questions are selected which are to be evaluated together.

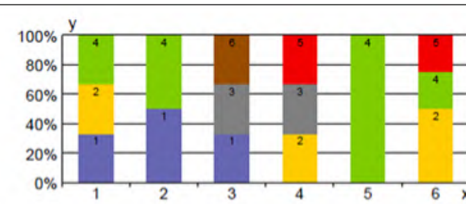
[Add] adopts the cross tab. An existing matrix can be edited using [Change], and [Delete]. Additional tables can be created. The number of cross tabs is not limited.

In the evaluation, question 1 is presented in the X-axis, Question 2 in the Y axis of the cross tab, and two cross tabs per page are displayed.

The display mode for cross tabulations can be adapted in the report settings. For further information see„Cross Tabulation Overview“, on page 379.

Note:
Please note that for reasons of space, cross tabulations can only be displayed correctly for questions with up to 11 answer options.

y / x	1	2	3	4	5	6	
1	33.3%	33.3%	0%	33.3%	0%	0%	100%
2	50%	0%	0%	50%	0%	0%	100%
3	33.3%	0%	33.3%	0%	0%	33.3%	100%
4	0%	33.3%	33.3%	0%	33.3%	0%	100%
5	0%	0%	0%	100%	0%	0%	100%
6	0%	50%	0%	25%	25%	0%	100%
	17.6%	23.5%	11.8%	29.4%	11.8%	5.9%	100%



x: What is your age?

1: 18-29
2: 30-39
3: 40-49
4: 50-59
5: 60-69
6: Older than 69

y: The technical equipment of the university is excellent.

1: strongly disagree
2:
3:
4:
5:
6: strongly agree

Figure 118: Cross Tabulation in the PDF Report

2.3.5. Characteristics of VividForms Designer Questionnaires

A VividForms Designer form can, as with any other VividForms Editor questionnaire, be used for surveys in evasys. There are some minimal restrictions:

- No optional questions can be activated for Designer Forms.
- Designer Forms cannot be used for module surveys.
- Designer Forms cannot be edited after publication.

In all other areas, a Designer form is the same as an Editor form.

By clicking on the name of a Designer form in the list of questionnaires, the details of the form are opened. Here, familiar settings such as editing text templates, depositing quality guidelines or adding languages can be made.

If required, the texts for PDF report and online survey can be adapted. This could be the case, if for example there is a typing error in the form which should not appear in the report/the online survey.

To do this, open the menu “Edit Texts (Report and Online Survey” in the section “Advanced Settings”.

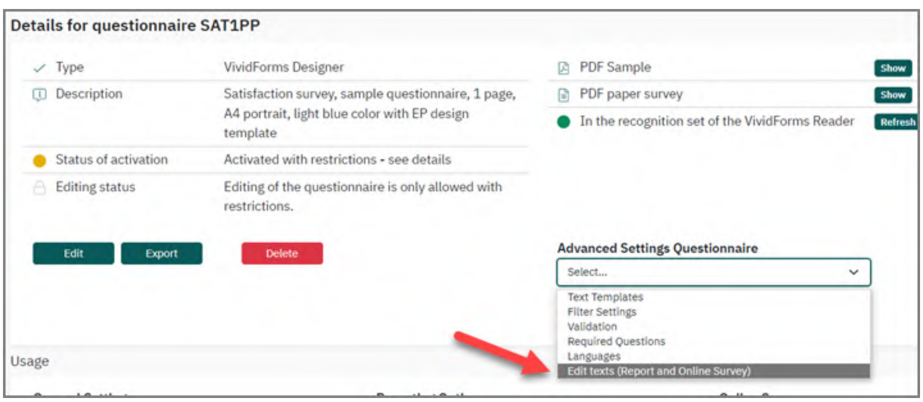


Figure 119: Menu “Edit Texts”

A new tab or window of the browser opens. In the upper part of the screen the meta-data of the form is displayed. Here you can adapt the name and description of the form, if required.

In the following section you can do filter settings, define validation, required questions and cross tabulations.

In the last section you can edit question texts, answer texts and pole texts of the form. Additionally, you can set indicators for question groups and define diagram types for scaled questions.

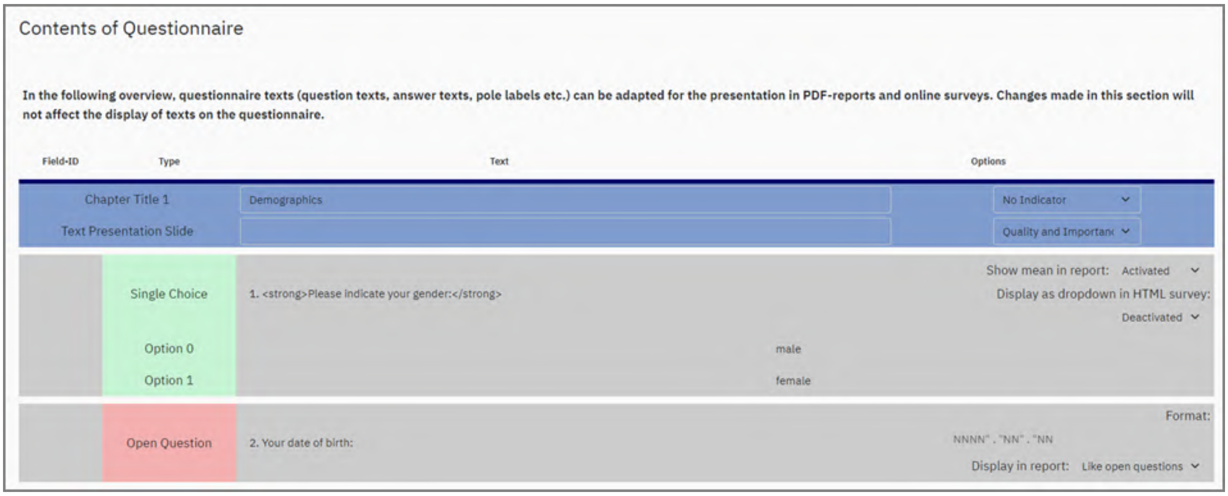


Figure 120: Edit Texts for PDF Report and Online Survey

> **Note:**
> Textual changes will only affect the PDF report and the online survey. Once published, the form itself cannot be edited any more.

Both paper and online surveys can be performed with Designer questionnaires. For online surveys you can choose whether to use an online template to present the questionnaire. In this case, the appearance of the questionnaire is controlled using the online template.

Alternatively, you can also reproduce the original layout of the Designer questionnaire as an online survey; this then has the same appearance in the online survey as a paper questionnaire. The advantage here is that formal aspects like multi-column layout or color settings correspond to those of the original questionnaire. In this case, select the “As paper” option for the “Online layout” setting in the questionnaire details.

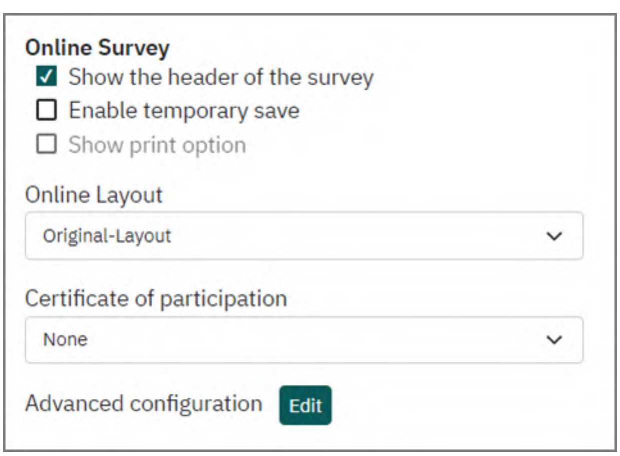


Figure 121: Online layout for designer questionnaires

Note:
Online surveys with Designer questionnaires in paper presentation are not web accessible. Participants can change to the standard view using a link in the footer; however, this also has limited web accessibility in the case of Designer questionnaires.

2.3.6. Question Library

The question library is centrally administered in the menu “Questionnaires/Question Library”. Different editing functions as well as functions for import and export are available here. Also, a print preview of all question groups and questions can be accessed.

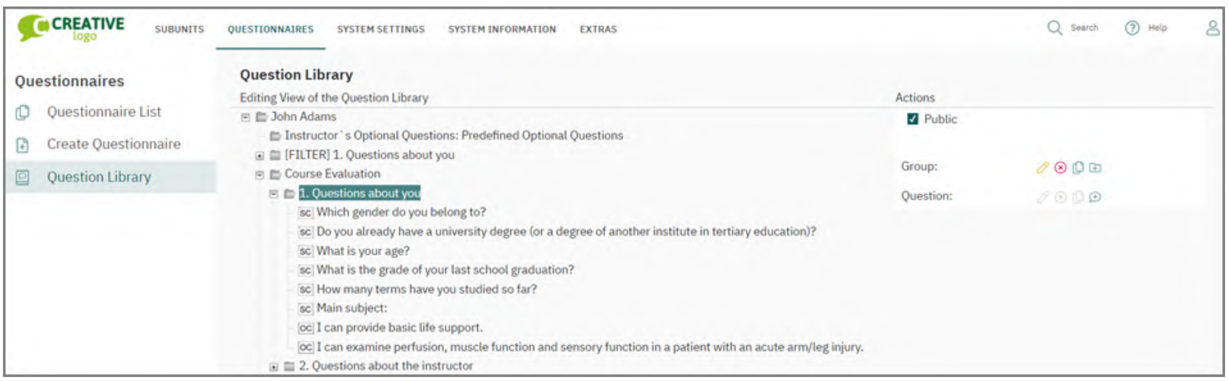


Figure 122: Question Library

Editing View

In the editing view, the current content of the question library is displayed in the form of a tree structure consisting of several levels:

- User, which means the “Owner” of the question groups/questions (Administrator, Subunit Administrator or Active User)
- Question Groups
- An optional number of subgroups
- Questions

By clicking on a user/a question group or on the open/close symbol in front of the entry, the entry is opened and the elements contained therein are displayed. When you click on a question group or question, the relevant details and available options are displayed in the right hand section of the window. The action buttons automatically scroll with the content, and remain on the right hand side of the screen. In the upper area it is defined whether the question group or question is a public or non-public one. Public questions and question groups are available to all users (subunit administrators, active instructors), non-public only to the relevant owner of the question/group. By activating or deactivating this option, the public status can be changed at any time.

For each question group and question, four actions can be undertaken:

- Edit: enables the retrospective editing of a question/group
- Delete: deletes the question/group from the library
- Copy: copies a question/group
- New Group/Question: creates a new group or question in the library

Figure 123: Question Library: Actions

To edit a question, use the mouse in the editing view to mark the desired question and then click on the pencil in the area “Question”. The Question Wizard known from work with the VividForms Editor opens. Here, the desired changes (e.g. changes to the question text, the answer options or the pole texts etc.) can be made.

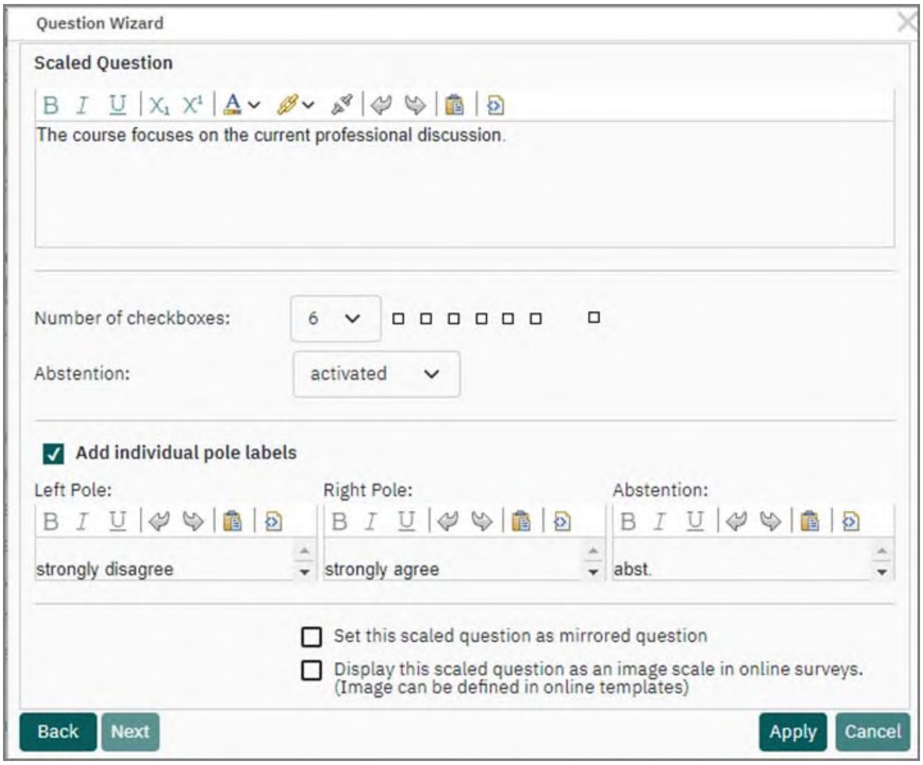


Figure 124: Question Library: Editing Questions

To edit a question group, use the mouse to mark the group or any question within the group and click on the pencil in the area "Group". Here too, the Question Wizard opens and enables editing.

To delete or copy a group or a question, mark the desired element and select the relevant action. Please observe, when deleting a question group, all questions contained therein are also deleted.

If you want to create a new question or question group, click on the corresponding icon in the category Group or Question. The wizard opens with which you can undertake the required settings. Finally, click on [Apply]. The group or question is now displayed in the library.

Question groups can be sorted into various parent groups, allowing the user to categorize them. This allows you to structure your question library simply and efficiently. In order to assign a parent group, you must first create this group as an individual new group, and give it a title. This group cannot contain any questions; if you add questions to the group, it will no longer function as a parent group. Once you have created a new group, you can use the group as a parent group for other question groups.

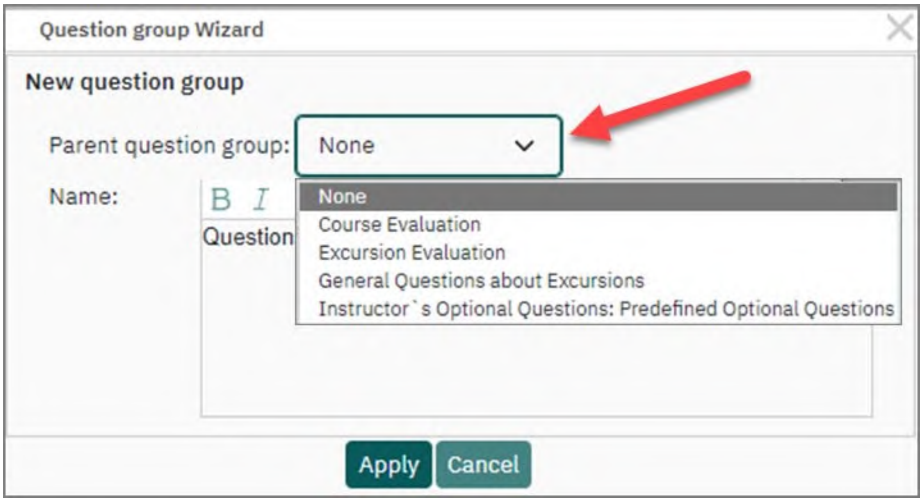


Figure 125: Assigning a Parent Question Group

Within the question library, questions can be moved from one question group to another using Drag&Drop. This is particularly useful if questions have been copied and then need to be integrated into a new question group. In this case, click on the question, keep the left mouse button pressed and drag the question to the desired position.

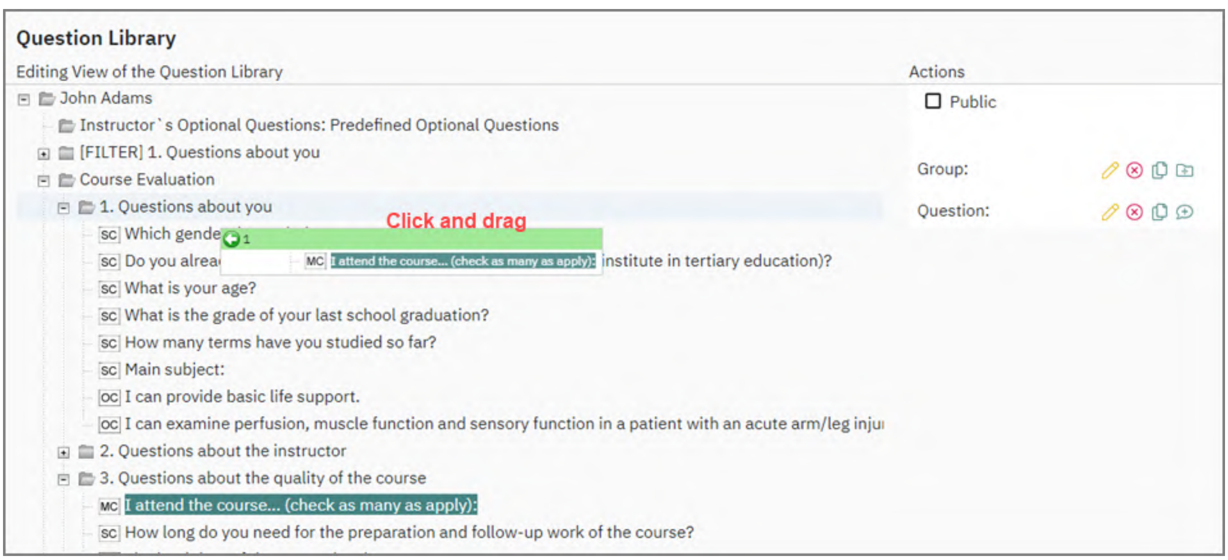


Figure 126: Move Question

Rights Structure

The administrator, as well as subunit administrators and active users (Instructors, Deans) all have access to the question library administration. Each user can maintain their own library and add, edit and delete questions and question groups at will. However, depending on the user role access and editing rights differ for the libraries of other users. The following table (to be read from left to right) is intended to clarify the rights structure of the differing user roles:

User/ Data Access		Question Libraries				
		Administrator		Subunit Administrator		Active User
		public	non-public	public	non-public	non-public
Administrator		x o	x o	x o	x	
Subunit-Admin (public)	own subunit	x		x o	x o	
	other subunit	x		x		
Subunit-Admin (non-public)	own subunit	x		x	x	
	other subunit	x		x		
Active User	own subunit	x		x		
	other subunit	x		x		

Legend:

x = View and Copy

o = Edit, Delete and Create new

Figure 127: Question Library: Access Rights

As seen in the overview, an administrator can access and edit public and non-public questions of other administrators as well as the public questions of subunit administrators and create new question groups and questions.

A subunit administrator who has the right to create public questions can edit the public and non-public question(group)s of other subunit administrators and also create new elements here, however, s/he only has viewing rights for other subunits.

A subunit administrator who does not have the right to create public questions, cannot edit the public or non-public questions of other subunit administrators in his subunit, s/he only has viewing rights.

The right to input public questions in the library can be given in the user properties of the subunit administrator. By default, subunit administrators do not have the right to create public questions.

In addition, subunit administrators can be withdrawn from the right to create their own questions in the VividForms Editor. This will force subunit administrators to use only questions from the public question library and prevents them from building their own question library.

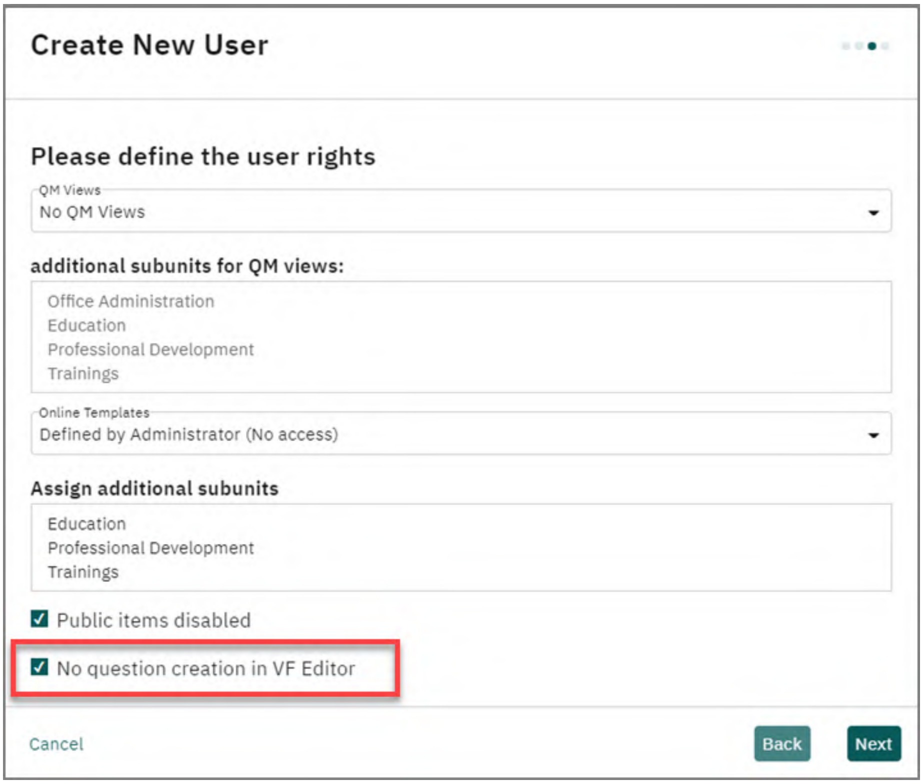


Abbildung 128: No question creation

The active user only has viewing rights and cannot input public questions into the library. S/he can however, copy question groups and questions from public librari

es into his own library, and edit them there.

Import and Export

The import into the question library as well as the export from it, is achieved via a CSV file. An example file for the import is included in the system (“System Information/ Sample files/Question library”). For more detailed information on importing and exporting the question library, please consult the evasys Technical Guide.

3. Phase 2: Implementation of Surveys

A survey is created initially by determining survey periods and structural criteria. When creating a survey, a course, a questionnaire and a survey period are linked together.

Example:

If you created a paper survey for the "Social Skills" course during the summer semester in 2013 using the "Instructors" questionnaire, you will not be able to create any other online survey for that same course using the same questionnaire and during the same period.

Structural information linked to the applied evasys structure, the subunits, users and courses, can be deposited via placeholders within the questionnaire, (see chapter D "If a participation certificate for participation in online surveys is activated in the questionnaire details in form of a PDF document, this text is used for the document."), and can, when generating the survey, be filled into the header or footer of the cover sheet.

Note:
Once the survey has been generated, the questionnaire can no longer be edited (see manual "Creating questionnaires with Vivid Forms Editor" chapter "Write-protect Mode").

3.1. Survey Procedures

Regardless of the survey procedure implemented, the process is distinctly arranged as follows: Survey generation, distribution to participants, collection of returns (if necessary), and the creation and distribution of the report.

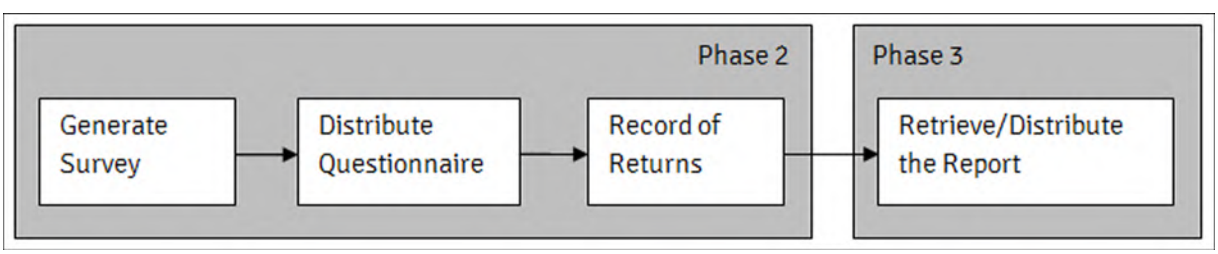


Figure 129: Survey Procedure Sequence

evasys supports a number of procedures for processing completed paper questionnaires as well as online surveys. The goal of these procedures is to make processing returns as smooth and anonymous as possible.

The procedure to be used is decided upon during creation of the survey. Below we will present a variety of paper and online surveys, as well as a hybrid survey. There will be an illustration of the survey procedure and detailed description of special features for each method used.

Following the presentation and comparison of paper-based questionnaires are instructions concerning the printing and document quality of questionnaires (chapter B

“Production of Questionnaires”). The chapter B “Multilingualism” describes how to reach multilingual survey participants.

Hybrid surveys are a combination of paper and online surveys. A hybrid survey procedure as well as its special features are described in more detail in chapter B 3.7. “Hybrid Surveys”.

The conception and comparison of online survey procedures are supplemented by the online survey preview (chapter B 3.15.1. “Preview Online Survey”), adjustment of the online templates (chapter B 3.15.2. “Customization of the Used Layouts”), notes on accessibility („Accessibility“, on page 182), the QR code use options (chapter B 3.15.6. “Application of QR Codes”) as well as participants' possibility to review results (chapter B 3.15.7. “Participation Tracking”). The chapter B 3.15.4. “Multiple Languages” shows which criteria are to be met for multilingual online surveys.

3.2. Generating Surveys

With this function you can generate any number of surveys. You must only make sure that the questionnaires you need exist, have been tested and are set for use. The setting which questionnaire can be used for which course is done at “Questionnaires/ Questionnaire List/Details” (see chapter B 2.3.2. “Questionnaire administration”). You can define here which questionnaire should be used for which course type and subunit.

To create a survey, click “Generate Surveys” in the “Subunits” menu. Now you must in succession in each field select one or a number of options. Depending on what you have chosen and the resulting restrictions you will then see only the valid selection options.

Select:

- a subunit,
- a survey period,
- one or more types of courses,
- a questionnaire,
- one or more courses,
- a survey type.

You can select more than one option by pressing down the left mouse button and pulling the mouse down. You can also hold the “Ctrl” button and select any number of individual courses.

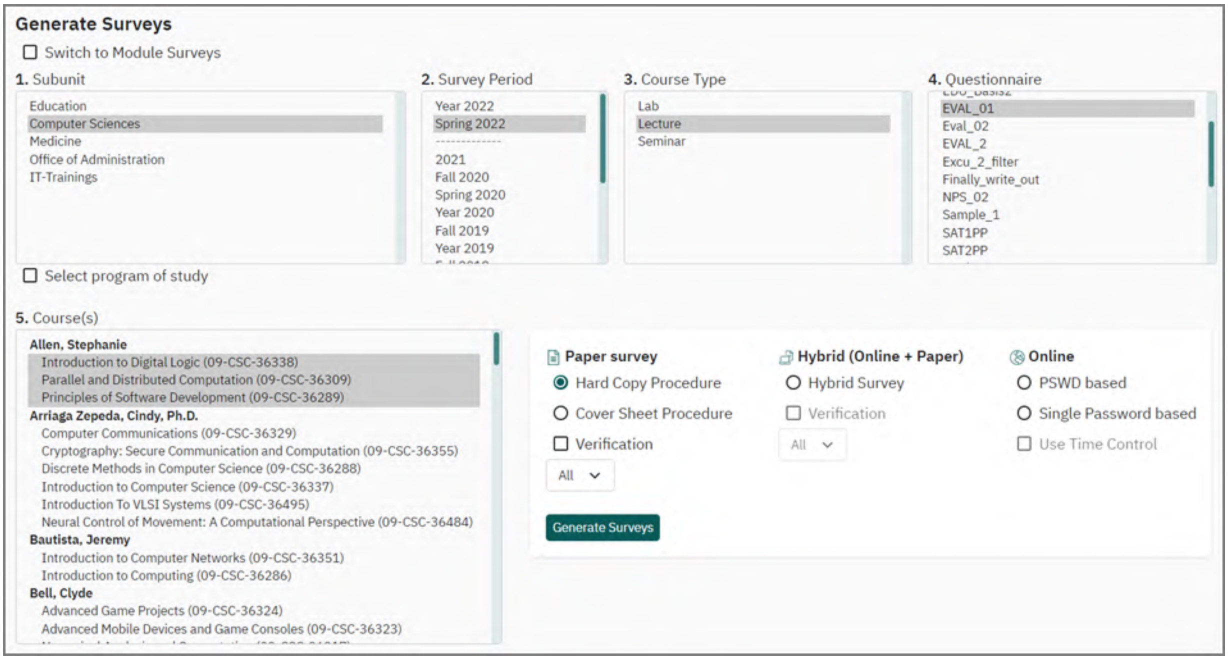


Figure 130: Generating Surveys

Finally you must select the survey method. You have the choice of:

- **Hard copy procedure (with optional Verification)** see chapter B 3.3. “Paper Based Surveys - Hard Copy Procedure”
- **Cover sheet procedure (with optional Verification)** see chapter B 3.4. “Paper Based Surveys - Cover Sheet Procedure”
- **Hybrid Questionnaire (with optional Verification)** see chapter B 3.7. “Hybrid Surveys”
- **PSWD-based Online Survey (with optional time control)** see chapter B 3.9. “Online Survey - PSWD-based”
- **Password Based Online Survey (no optional time control)** see chapter B 3.12. “Online Survey - Password Based”
- **Additional Option: Verification** see chapter B 4.4. “Verification”.

  You can choose “Verification” for all types of paper surveys as well as for hybrid questionnaires. If it is activated, once the questionnaire has been scanned, uncertain readings within the VividForms Reader can be double checked, for example, if the degree of blacking in a certain box is very light, or no blacking could be identified. You can use the drop-down menu to choose whether all questions, or only ICR questions are to be verified.

- **Optional Time Control** see chapter B 3.10. “Online Survey with Time Control”

  You can choose “Use Time Control” for PSWD-based online surveys. You can use time control to run surveys automatically, as you can set times for certain actions to take place (sending PSWDs, reminders, etc.). For more information on time control, The possibilities of distributing questionnaires and PSWDs are described in chapter B 3.21. “Batch Events”.

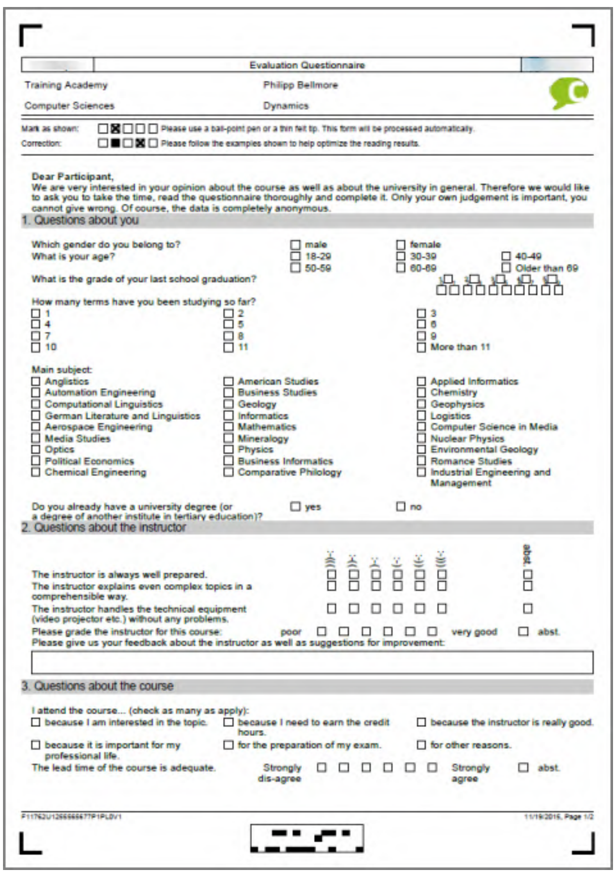
3.3. Paper Based Surveys - Hard Copy Procedure

Each questionnaire for each course is downloaded, automatically personalized and printed.

- Questionnaire
- Workflow of the Hard Copy Survey
- Specialty: Serial Number

3.3.1. Questionnaire

The hard copy procedure involves identifying the questionnaire for every course. The operation number is printed at the bottom of the page. Additional information fields can be printed in the header of all the questionnaires. Optional additional questions, whose content can be determined by the instructors themselves, can also be included.



Evaluation Questionnaire

Training Academy — Philipp Bellmore

Computer Sciences — Dynamics

Mark as shown: Please use a ball-point pen or a thin felt tip. This form will be processed automatically.

Correction: Please follow the examples shown to help optimize the reading results.

Dear Participant,
We are very interested in your opinion about the course as well as about the university in general. Therefore we would like to ask you to take the time, read the questionnaire thoroughly and complete it. Only your own judgement is important, you cannot give wrong. Of course, the data is completely anonymous.

1. Questions about you

Which gender do you belong to? ☐ male ☐ female

What is your age? ☐ 18-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ Older than 69

What is the grade of your last school graduation?

How many terms have you been studying so far?
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ More than 11

Main subject:
☐ Anglistics ☐ American Studies ☐ Applied Informatics
☐ Automation Engineering ☐ Business Studies ☐ Chemistry
☐ Computational Linguistics ☐ Geology ☐ Geophysics
☐ German Literature and Linguistics ☐ Informatics ☐ Logistics
☐ Aerospace Engineering ☐ Mathematics ☐ Computer Science in Media
☐ Media Studies ☐ Mineralogy ☐ Nuclear Physics
☐ Optics ☐ Physics ☐ Environmental Geology
☐ Political Economics ☐ Business Informatics ☐ Romance Studies
☐ Chemical Engineering ☐ Comparative Philology ☐ Industrial Engineering and Management

Do you already have a university degree (or a degree of another institute in tertiary education)? ☐ yes ☐ no

2. Questions about the instructor

abst.

The instructor is always well prepared.

The instructor explains even complex topics in a comprehensible way.

The instructor handles the technical equipment (video projector etc.) without any problems.

Please grade the instructor for this course: poor ☐ ☐ ☐ ☐ ☐ ☐ very good ☐ abst.

Please give us your feedback about the instructor as well as suggestions for improvement:

3. Questions about the course

I attend the course... (check as many as apply):
☐ because I am interested in the topic. ☐ because I need to earn the credit hours. ☐ because the instructor is really good.
☐ because it is important for my professional life. ☐ for the preparation of my exam. ☐ for other reasons.

The lead time of the course is adequate. Strongly dis-agree ☐ ☐ ☐ ☐ ☐ ☐ Strongly agree ☐ abst.

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Figure 131: Hard Copy Procedure

3.3.2. Workflow of the Hard Copy Survey

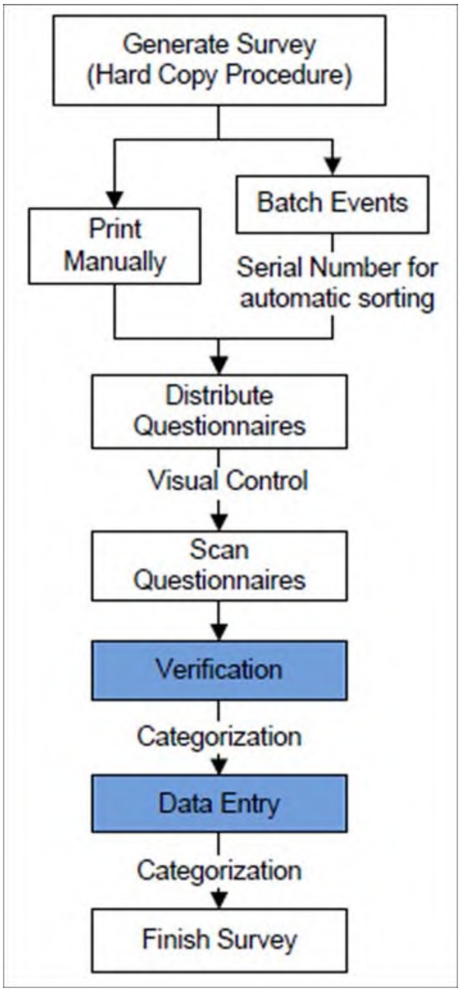


Figure 132: Hard Copy Procedure Sequence

Each hard copy survey requires questionnaires to be printed separately, following survey generation. Alternatively, you can make use of the “Batch Events”. This is particularly recommended if the questionnaires are multi-paged and a serial number for cohesion of the individual pages has to be added (see chapter B 3.3.3. “Specialty: Serial Number”). During the hard copy procedure, the course data is filled into the header of the questionnaire, meaning it can only be used for this particular course.

Placeholders can also be replaced by static texts. Please note that long texts in placeholders on the sample and in the PDF preview are cut off. On the questionnaire, however, the text is automatically scaled to the corresponding size. Please use the option “Placeholder across both columns“.

Hint:
Please carry out a short visual inspection of the returns before scanning. You can thereby identify damaged corners or manipulated barcodes, preventing problems during form processing

After scanning the questionnaires there is an option to check any faultily read fields. This step is called **verification** (see chapter B 4.4. “Verification”). Verification can be activated during the creation of the survey. Anonymization of handwritten answers during **data entry** is also optional and can be activated for the subunit as required (see chapter B 4.5. “Manual Entry of Handwritten Comments”). **Categorization** of unanswered questions can be carried out regardless of data entry (see chapter B 4.6. “Categorization of open questions”). All three steps of the process can, when required, be carried out independently of one another.

3.3.3. Specialty: Serial Number

The hard copy procedure also allows all of the questionnaires to be numbered. This is especially useful when the questionnaire contains more than two pages, or when printed on both sides of the page on more than one page of paper. This guarantees that the questionnaire sets are logically coherent even if they are mixed up when collected. Printing of questionnaires with a serial number is carried out using the batch events (see chapter B 3.21. “Batch Events”).

3.4. Paper Based Surveys - Cover Sheet Procedure

A cover sheet is printed for each course, while the questionnaires are preproduced. Afterwards the cover letter is scanned together with the completed questionnaires and serves to identify the survey.

Cover Sheet and Questionnaire

The cover sheet procedure has a special feature that allows the same questionnaire to be used in a variety of courses. Mapping of the returns to the course is carried out using the cover sheet. This contains information about the course and shows the operation number and barcode in the footer of the sheet. When put into practice, it should be ensured that the return source is known so that the correct cover sheet can be allocated to the corresponding questionnaire.

With the cover sheet procedure, cost savings can be achieved through the production of larger quantities of questionnaires in printing shops.

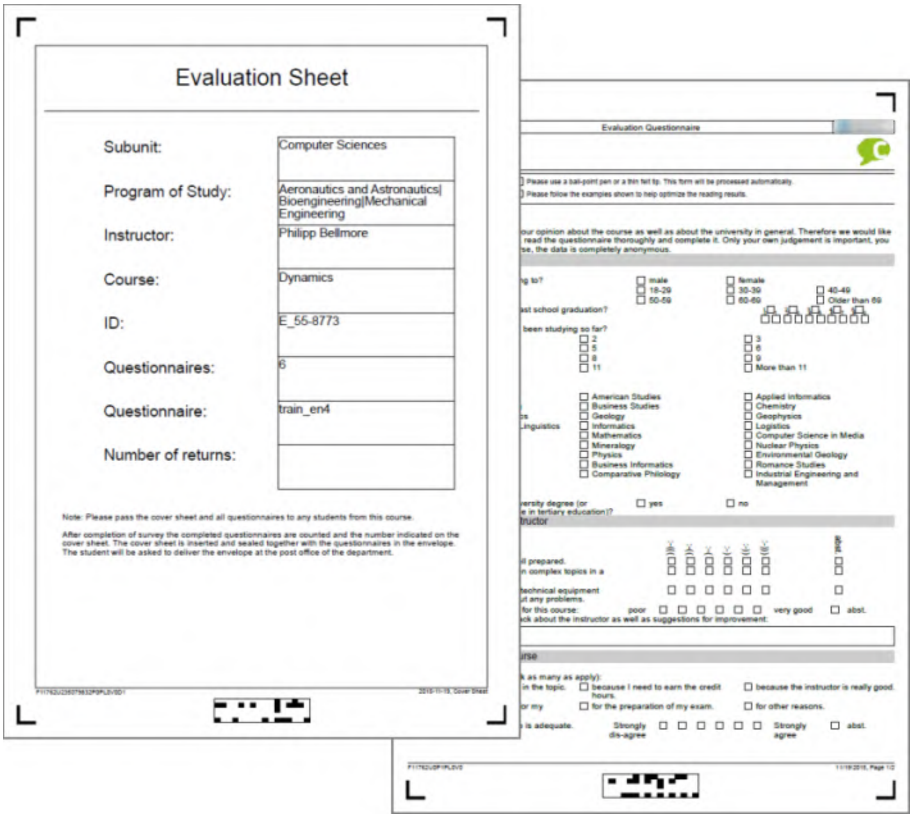


Figure 133: Cover Sheet Procedure

Workflow

A characteristic feature of the cover sheet procedure is the use of the same questionnaire for various courses. When scanning the forms, the questionnaires are allocated to the corresponding courses with the help of the cover sheet. The cover sheet contains information about the course, the survey ID and the barcode.

When working with the cover sheet procedure it is important to know the origin of the returned questionnaires so that the correct cover sheet can be used.

After you create a cover sheet survey, the cover sheet and questionnaires can be printed manually or by using the batch events (see chapter B 3.21. “Batch Events”). Alternatively, both items can be sent to the instructors for manual printing. There is also the option of printing the cover sheet before scanning and allocating the returns accordingly..

Hint:
A4 envelopes bearing the stamp of the course are practice-proven when collecting returns.

The cover sheet has to be scanned in PRIOR to the returns. This is the only way that the completed survey questionnaires can be correctly allocated.

Hint:
Please carry out a short visual inspection of the returns before scanning. You can thereby identify damaged corners or manipulated barcodes, preventing problems during form processing.

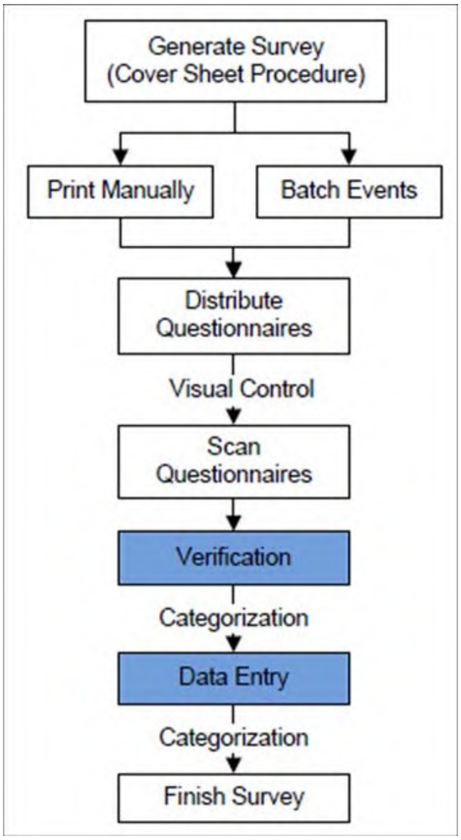


Figure 134: Workflow Cover Sheet Procedure

After having scanned the forms you can verify the checkboxes which could not be clearly and securely read by the system (see chapter B 4.4. “Verification”). This step can be activated when generating the survey. If required, the anonymization of handwritten texts with the help of the Data Entry Assistant can be activated for each subunit (see chapter B 4.5. “Manual Entry of Handwritten Comments”). You can furthermore categorize answers of open questions. This step does not depend on data entry (see chapter B 4.6. “Categorization of open questions”). The three steps (verification, data entry, categorization) are independent of each other and can be used if required. Specialty: Signature on the Cover Sheet

The cover sheet of a cover sheet survey can, where desired, be fitted with a signature field for the instructors of the relevant course. This function allows for the explicit consent of the instructors in the further processing of the evaluation data as well as their unencrypted email dispatch.

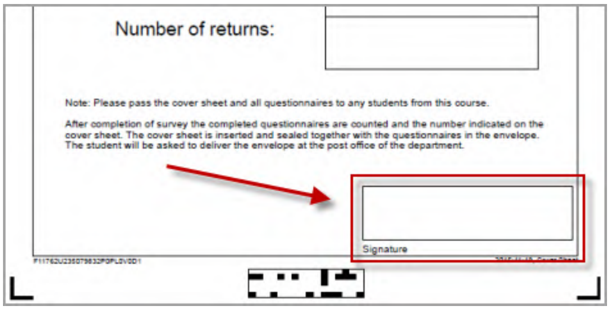


Figure 135: Cover Sheet Procedure: Cover Sheet with Signature Field

To use this function, it must first be activated by the administrator in the configuration. To do this, go to “System Settings/evasys Settings/Survey” and activate “PDF Report dispatch only on instructor's signature”. In addition, in the menu “System Settings/evasys Settings/Email Functions & Accounts” the option “Conditional email report dispatch” must be set to the value “survey”. Furthermore, the explanatory text printed on the cover sheet can be adapted and provided with the required information for the instructors. For this, save the desired text at “System Settings/evasys Settings/VividForms/Cover Sheet Text”.

Now, with each cover sheet survey, the cover sheet is automatically provided with a signature field. When scanning, the system checks whether a signature is present in the appropriate field. If no signature can be identified then the email dispatch of PDF reports is suppressed. The administrator or subunit administrator can access and print the report in the survey details, but cannot send it by email. Also, features such as automatic dispatch processes do not apply.

To enable the survey to be sent retrospectively - where necessary, after consultation with the instructor and examination of the survey - the email dispatch can be manually overridden in the details of the survey.

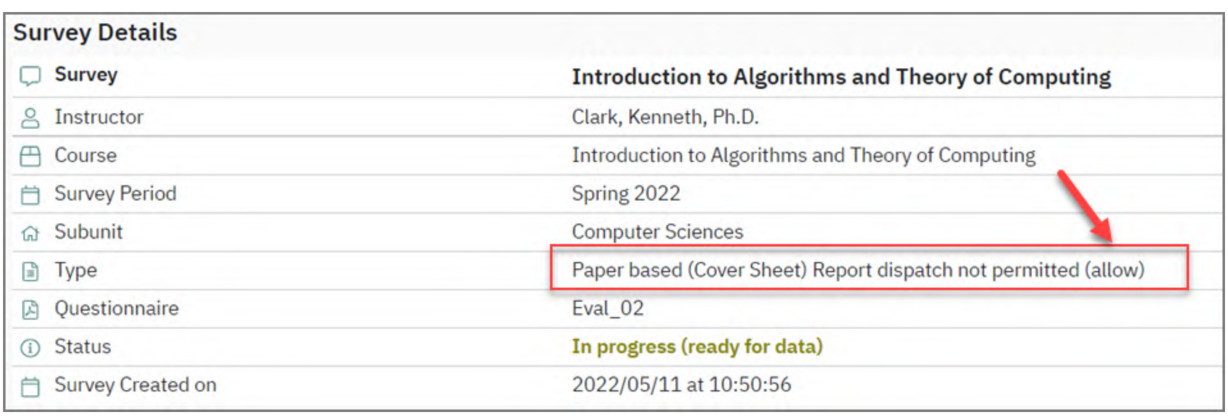


Figure 136: Cover Sheet Procedure: Allow Report Dispatch

3.5. Comparison of Paper Survey Procedures

The following procedure comparison of paper surveys shows differences and points out special features.

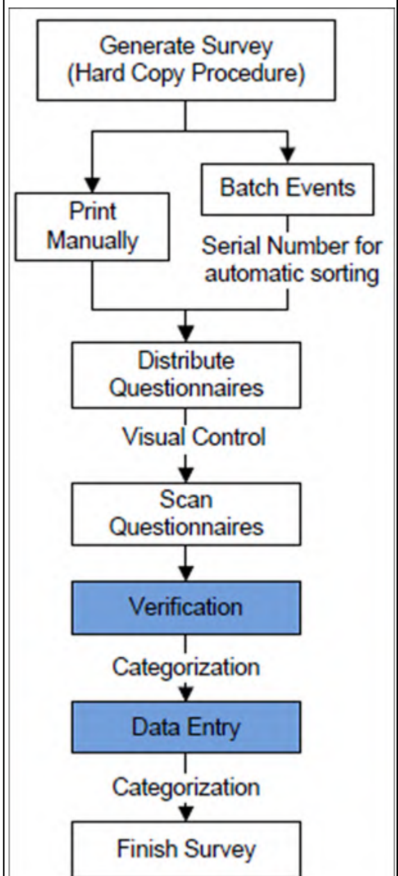
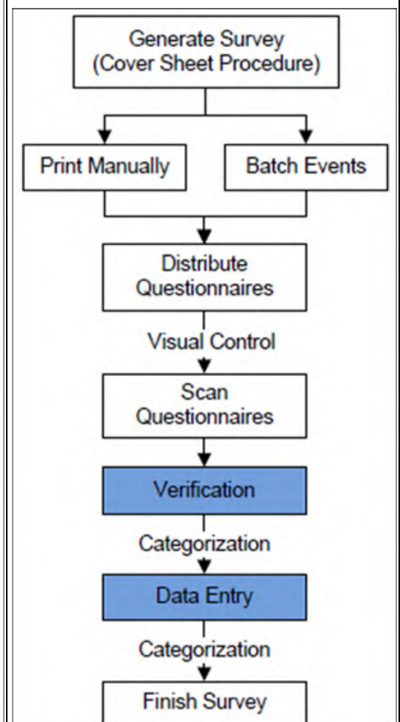
	Hard Copy Procedure	Cover Sheet Procedure
		
Information about the course	On the questionnaire	On the cover sheet
Questionnaire	Can be used only for ONE course.	Can be used for an unlimited number of courses.
Organization	The questionnaire must be used in the correct course.	The correct cover sheet must be scanned with the according returns.
Using placeholders (see chapter D 2.1.8. “Placeholders for Text Templates and Questionnaires”)	Yes	No
Instructor’s optional questions procedure (see chapter B 3.20. “Adding Questions Using the Instructors Optional Questions”)	Yes	No
Benefit	Clear allocation of a questionnaire to a survey, serial numbering possible	Pre-production of large questionnaire quantities possible, no remainders

Table 5: Comparison of Paper Survey Procedures

3.6. Instructions for Paper-based Surveys

Below you will find information on printing forms, ensuring document quality and dealing with multilingual paper surveys.

Production of Questionnaires

When using the cover sheet procedure, questionnaires are given to a printing company for production and are then used as needed for surveys. The cover sheets can be centrally produced and distributed to the instructors. Alternatively the cover sheets can be sent to the instructor by email.

In the hard copy procedure the questionnaires adapted for specific surveys are either produced centrally or by email delivery to instructors.

Printing and mailing of the questionnaires is able directly from the details of every single one survey (see chapter B 3.17. “Survey Details”). Alternatively the batch events are available to produce questionnaires in bulk (see chapter B 3.21. “Batch Events”).

Document Quality

The quality of the paper and the print image is critical for the scanning and processing stages.

We discourage the use of gray recycled paper due to the gray shadows which can appear.

Note that when producing questionnaires using private printers or copiers the printer driver is set up for A4 size paper and the copies should vary, due to tilting or enlargement/reduction, only marginally from the original. The tolerance range for such image discrepancies is about 10% of an edge length. The general rule is that clearly visible changes to the original document should be avoided.

Multilingualism

The use of multilingual questionnaires is important for organizations with different language target groups. For a multilingual paper survey, a separate questionnaire and thus separate survey must be created for each language required. These surveys can be compiled manually for overall evaluation using the report creator (see chapter B 5.2.2. “General Options during Report Creation”).

The language of the explanatory remarks on filling in and correcting checkboxes which are shown in the header of the questionnaire can be influenced by defining the basic language of the form in the questionnaire details (”Advanced settings/Languages”). For further information see chapter B 3.15.4. “Multiple Languages”.

3.7. Hybrid Surveys

You can use hybrid questionnaires to create surveys which are both online and on paper. The participants can take part using both mediums; they receive a paper questionnaire as well as a PSWD to participate in the questionnaire online. The PSWD and paper questionnaire are linked to each other. If the PSWD has been used, the data from the paper questionnaire is not evaluated, and vice versa.

The paper questionnaire and PSWD must be connected during the questionnaire creation process, by integrating a placeholder for the PSWD and online survey URL into the header of the questionnaire. You should therefore add rows to the questionnaire header if necessary, and add the placeholders [SHORT_PSWD] and [SERVER] to the header. You may want to include an explanatory text. You can also exchange the logo in the questionnaire header for a QR Code, if so desired. Participants with mobile devices are then able to scan in the QR Code and access the online survey using their mobile device. (For more information on QR Codes, see chapter B 3.15.6. “Application of QR Codes”.).

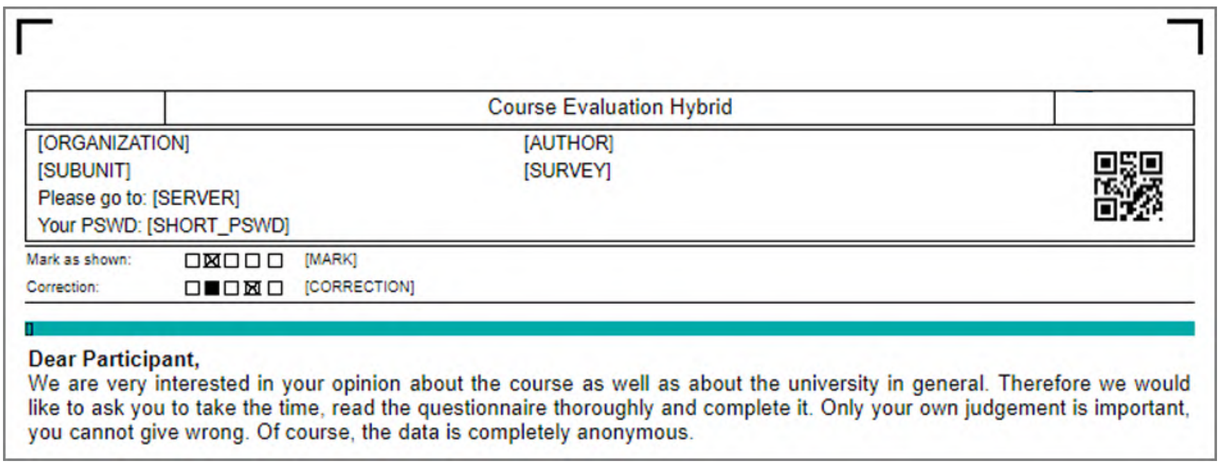


Figure 137: Hybrid Questionnaire: Questionnaire header with placeholders [SHORT_PSWD] and [SERVER]

Note:
A hybrid questionnaire is only useful if the paper questionnaire includes a placeholder for the PSWD!

Once the hybrid questionnaire has been created using the menu “Generate Surveys” in the main menu “Subunits” it will appear in the survey list. You can recognize the hybrid questionnaire by its icon, a combination of a globe and a paper sheet:

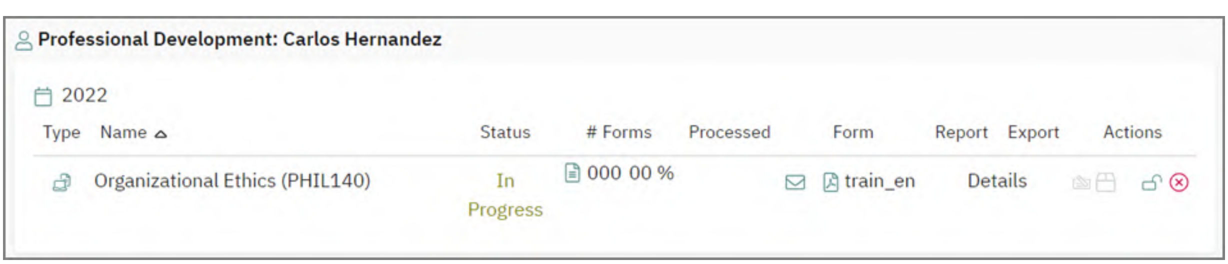


Figure 138: Hybrid Questionnaire: Display in the Survey List

Click on the name of the survey to access the survey details. You will see a variety of options for printing the questionnaire and/or sending PSWDs. There are two basic ways to carry out a hybrid survey:

- Send the PSWDs to participants; the paper questionnaire is attached to the email to print out as an alternative option (see chapter B “Distributing PSWDs”).
- Distribute paper questionnaires to the participants; the PSWD for filling out the survey online is printed on the questionnaire (see chapter B 3.21. “Batch Events”).

To send the PSWDs to participants via email, click “Send PSWDs to the Participants via Email.” The survey participants will then receive an email which contains information on the online survey as well as the paper questionnaire:

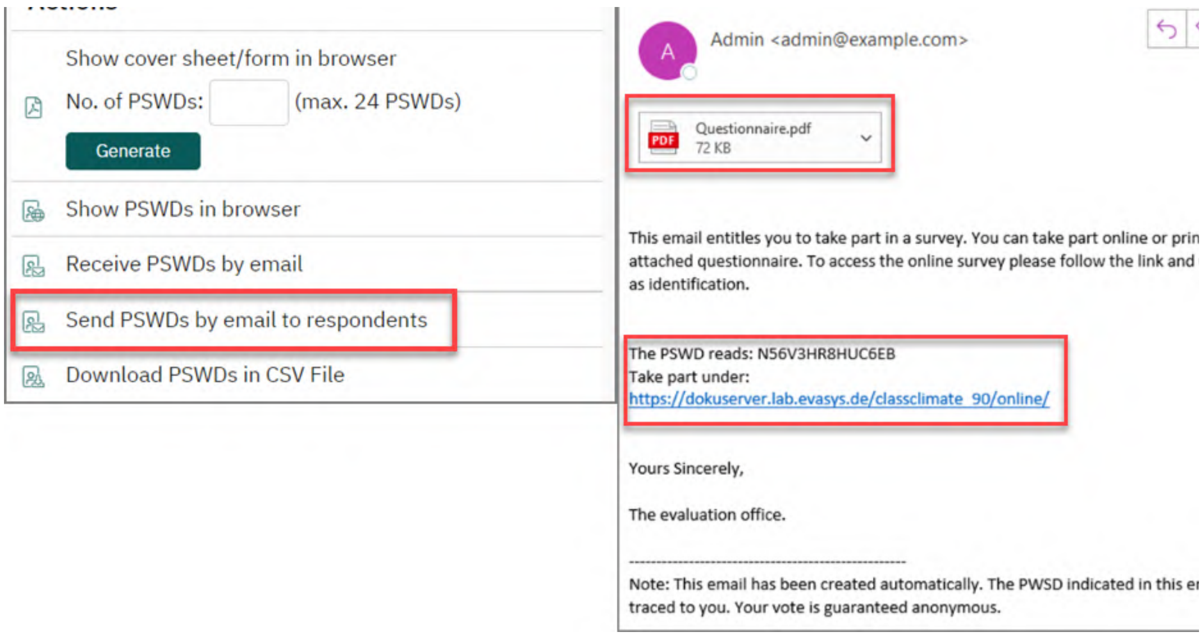


Figure 139: Hybrid Questionnaire: Sending PSWDs and Questionnaires via Email

We recommend using batch events for paper questionnaires that are to be distributed in a course, such as those featuring a QR code for online participation. It allows all hybrid questionnaires to be downloaded as a PDF document for printing (see chapter B 3.21. “Batch Events”). In order to reprint questionnaires, PSWDs have to first be generated as part of the survey's details.

A second option for the downloading and printing of single questionnaires is found in the details of the survey. To send the questionnaire, enter the number of PSWDs needed for the combined paper and online questionnaire in “Cover Sheet/Display Questionnaire,” and click on [Show]. The page will reload and you will see a [Download] button, which will allow you to open a zip file which contains a PDF questionnaire for every participant (this number is the same as the number of PSWDs required). The questionnaires can now be printed and distributed to the participants.

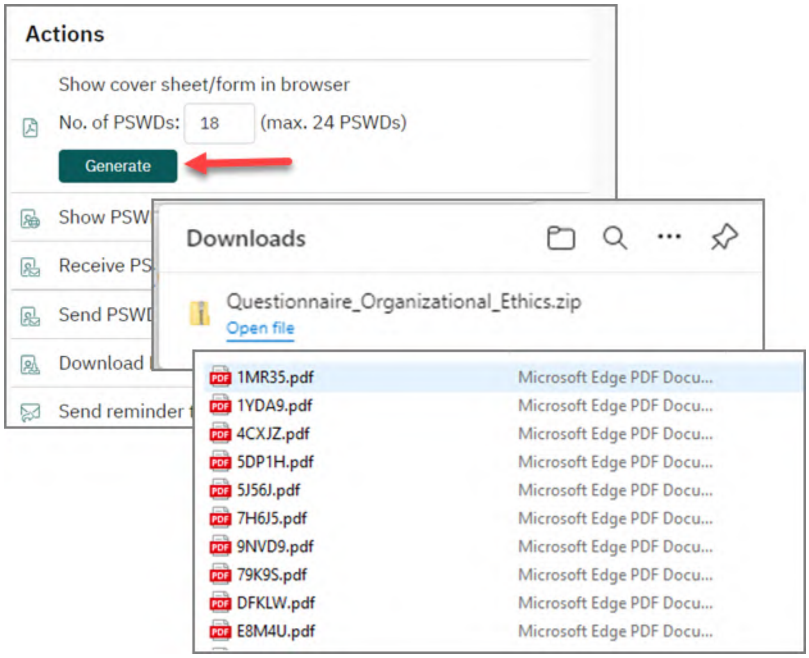


Figure 140: Hybrid Questionnaires: Downloading Questionnaires

Note:
The placeholder in the header of the PDF questionnaires ensures that each questionnaire contains a PSWD; each questionnaire also has a serial number. In combination, the PSWD and serial number ensure that the participant can only fill out the survey in one medium (paper or online). Questionnaires cannot be copied, as this would create duplicate PSWDs and serial numbers. Always print the questionnaires!

In addition, please note that: With hybrid questionnaires, the individual questionnaire sets must always be completely scanned in one batch. If you scan one set in two batches, the pages are rejected from the second batch because the PSWD is already viewed as used up.

You can access the PDF report as well as the raw data for the hybrid survey once it is complete. The CSV raw data shows which medium participants used to fill out their questionnaires (Paper = P, Online = O, Online with mobile device = M).

3.8. Online Surveys

No software is necessary for filling a HTML questionnaire apart from a browser.

An online survey can appear as either a complete questionnaire or in sections, in which case the respondent can navigate back and forth between sections. Also in PSWD-based surveys participants can save their entries and return to the questionnaire at a later point in time to complete it. (see chapter B 2.3.2. “Questionnaire administration”).

A print button may be activated in order to print the completed questionnaire. The questionnaire must be saved temporarily before printing (see chapter B 2.3.2. “Questionnaire administration”).

Another feature is the filter tool which allows you to define skipping rules in order to skip irrelevant questions.

Example:

The participant has responded to a question whether a presentation program was used with “no”. Any following questions about the quality of the presentation program should not be answered in order to avoid falsifying the data.

If an online survey has an insufficient response rate, a reminder function can batch email the participants with a reminder to complete the questionnaire. The anonymity of the participant remains unaffected. Upon submission the system will save a time stamp which is available through the raw data export for each dataset.

This information can be used to analyze the respondent behavior.

The option “certificate of participation” is available to allow the participants to prove their completion of the survey. This certificate can either be displayed as a PDF document after submission of the form, or provided through an email with a PDF attachment. The certificate can only be mailed if the PSWDs were sent out by email in the first place.

Online surveys are symbolized with a globe. You can create so called templates to customize online surveys to individual needs. (see chapter B 3.15.2. “Customization of the Used Layouts”)

3.9. Online Survey - PSWD-based

In the PSWD-based online survey, each participant receives his or her own PSWD (= transaction number) with which s/he can log into the online survey. When creating an online survey, evasys automatically generates a certain number of PSWD codes.

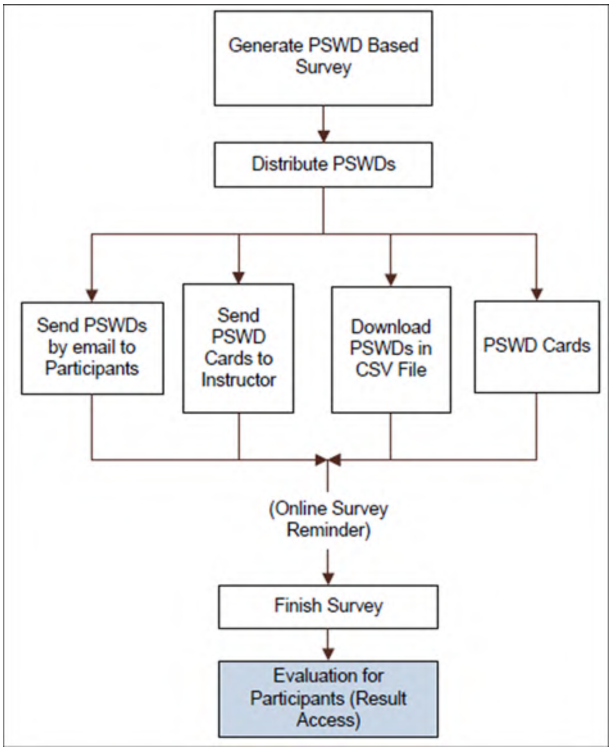


Figure 141: Workflow PSWD based Survey

Depending on the selected PSWD distribution procedure, there is a reminder option for participants who have not yet taken part in the survey. After the survey is completed, all participants have the option of reviewing the results (see chapter B 3.15.10. "Viewing the Results for Survey Participants")

Note:
The PSWD codes are five digit alphanumerical combinations, which are composed from a character set of 32 characters. Therefore, there are more than 33 million possible PSWD combinations, which is why the PSWD procedure is regarded as extremely safe. Based on the PSWD codes, the one-time participation in a survey is guaranteed. PSWD codes ensure that a participant takes part in a survey only once as without them it would be impossible to prevent an individual from completing a questionnaire more than once.

Distributing PSWDs

The PSWDs as unique permission to participate in the survey must now be passed on to the participants. In the survey details, section "Actions", various ways of sharing PSWDs are available. Please check which procedure suits your organization best.

- Send PSWDs by email to respondents

  The PSWDs are sent to the survey participants using an email address list. This dispatch is carried out by the evasys server. Using the reminder function you can send an email at a later time to all PSWD recipients who have not yet taken part in the survey.

Hint
Instead of sending the PSWD and the server address for the online evaluation you can use the placeholder [DIRECT_ONLINE_LINK]. This placeholder adds a link to the online survey that contains the server address as well as the PSWD/password. Simply clicking the link therefore shows the online questionnaire.

When a participant who received his PSWD via email participates in an online survey, the system checks whether further surveys are available for the participant. If so, after submitting the form these will be displayed in a list of all previous and pending online surveys of the current period. By clicking on the link "Join now", the participant is taken directly to the online survey, without further need to identify with a PSWD.

Figure 142: Online Surveys: List of Surveys after Submitting Form

Should this function not be desired, it can be deactivated in the configuration under "System Settings/evasys Settings/Survey Online/Display the List of All Current Surveys After Submitting an Online Survey".

If alternative forwarding is activated in the System Settings, section "Survey Online" or if forwarding is activated in the questionnaire details, the list cannot be displayed.

- PSWD cards

  The PSWDs are produced as a PDF document. These PSWD cards have an entry code, the Internet address as well as the name of the survey. These PSWD documents can be either opened by the administrator or sent to the instructor per email.

  If a QR code for mobile device use is to be displayed on the PSWD card, then please refer to chapter B 3.15.6. "Application of QR Codes".

- Receive PSWDs by Email

  This function allows the sending of a PDF document to the instructors complete with the available PSWD card. They can then print the document on perforated paper, for example. Corresponding presets are to be found under "System Settings/evasys Settings/Surveys Online" (see chapter D 2.5.4. "Survey Online").

- Download PSWDs in CSV file

  Downloading the PSWDs in CSV format allows you to incorporate the access codes, e.g. for distribution as a mail merge document or a customized template.

The possibilities of distributing PSWDs are described in chapter B 3.21. “Batch Events”.

3.10. Online Survey with Time Control

evasys provides the option to run time-controlled surveys for PSWD-based and single password online surveys. After having activated the different tasks the evasys server automatically sends emails with the corresponding contents. You do not have to define all tasks. Adapt the procedure to your internal requirements.

Note:
It is advisable to arrange a convenient time for mass mailing with the IT department.

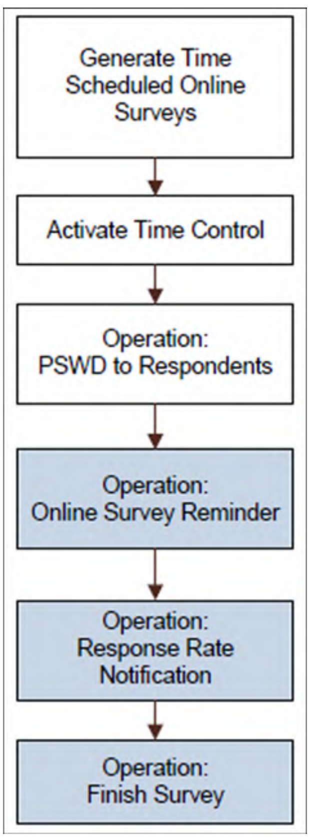


Figure 143: Workflow PSWD based Survey with Time Control

Time Control

The following actions can be controlled:

- Starting the survey and dispatching the PSWDs/password by email to the respondents
- Reminder to respondents per email
- Sending a message to the instructor or another user in the event that survey returns are below a certain value

- Closing the online survey and, if necessary sending an email with evaluation report to the instructors.

These actions are managed separately in the so-called “Scheduled Tasks“.

The activation and settings of the time-triggered control system are dependent on each survey. That means that the process of each online survey can be separately controlled. An overview of all planned operations can be found in the menu [Subunits/ Scheduled Tasks].

Hint:
Because you can set the time-triggered control at any time you can send emails at a time when there is relatively little traffic (usually at night).

- **Activate time-triggered control**

  To activate the time-triggered control when generating an online survey put a checkmark in the box. You can always activate the time-triggered control at a later date by using the menu item in the survey detail view.

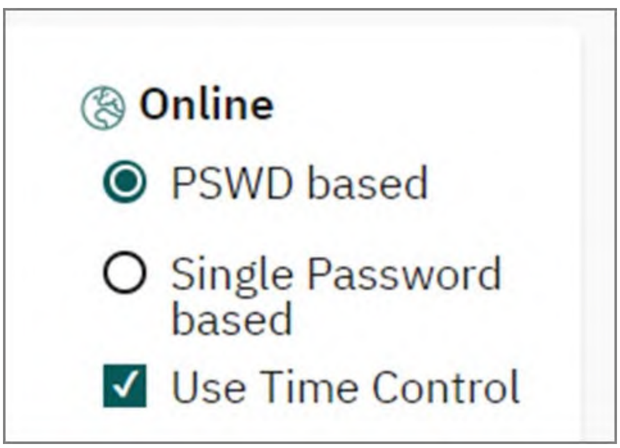


Figure 144: Time Control

After generating the survey you can define the planned operations for the survey in the following view.

In the header is the name and number of the survey. By clicking [Next survey] and [Previous survey] you can navigate between the surveys.

In the view beneath the header there are three actions which can be activated and controlled separately. Clicking on the button [Edit] will take you to the action you want.

After generating the survey all actions are deactivated by default. By clicking on [Activate] you can activate the operation.

The next sections give a detailed description of the individual actions/operations.

- **Operation “PSWD/Single password to respondent”**

The “PSWD to Respondent” operation starts the online survey. That means that the participants to the survey receive an email with the login information.

For this email you can define the following details:

- Sender Email (Default: Email address from the system settings)
- Sender Name (Default: Email address from the system settings)
- Subject Line of email (Default: Subject line from the setting “Text Template”)
- Text of email – The email text can have placeholders (Default: Email text from the setting “Text Template”)
- Email Addresses – List of the email addresses of all respondents

The number of email recipients is limited by the number of available transaction numbers. Participant data which has already been imported, is displayed here. If no import has taken place yet, participants can be added manually or via Copy&Paste. Please note that the recipients are separated by paragraphs.

If you add further participants to the course after you have generated the survey (manually in the details of the course or via CSV import), these will automatically be added to the recipient list, but only as long as the PSWD dispatch has not yet been activated. If the PSWDs have already been sent to the respondents, PSWDs must be sent manually using the “Send PSDWs by email to respondents“ function in the survey details.

If you subsequently delete a participant for the course, you must also delete him or her manually from the list of recipients in the scheduled tasks.

The time of the email operation can be defined in the field “Start Date”. A click on the button with the calender symbol opens the calendar.

All settings can be saved by clicking [Save].

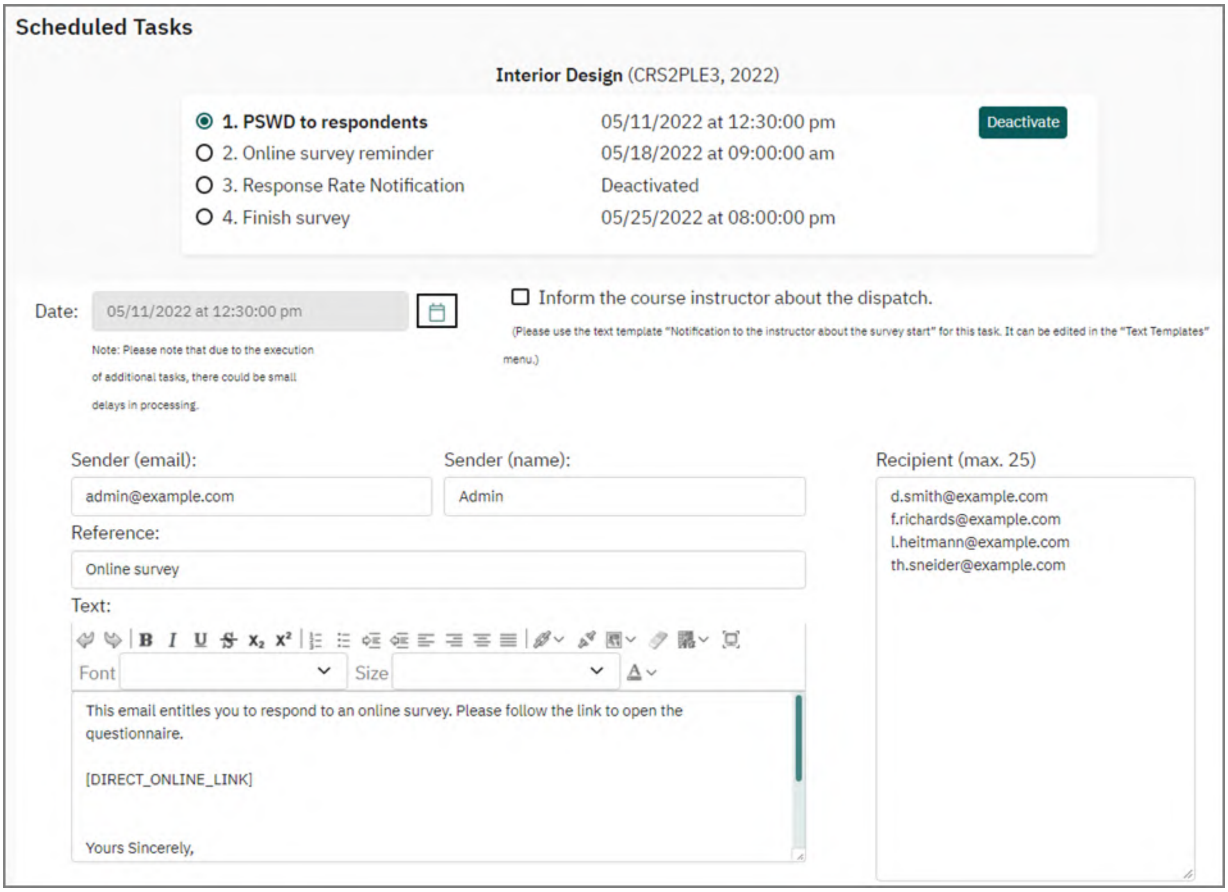


Figure 145: Define Scheduled Tasks

The instructor of the course can be informed about the survey start by activating the check box „Inform the instructor of the course about the PSWD dispatch“. Please note that there is a special email template for this in the menu “Settings/ evasys Settings/Text Templates”.

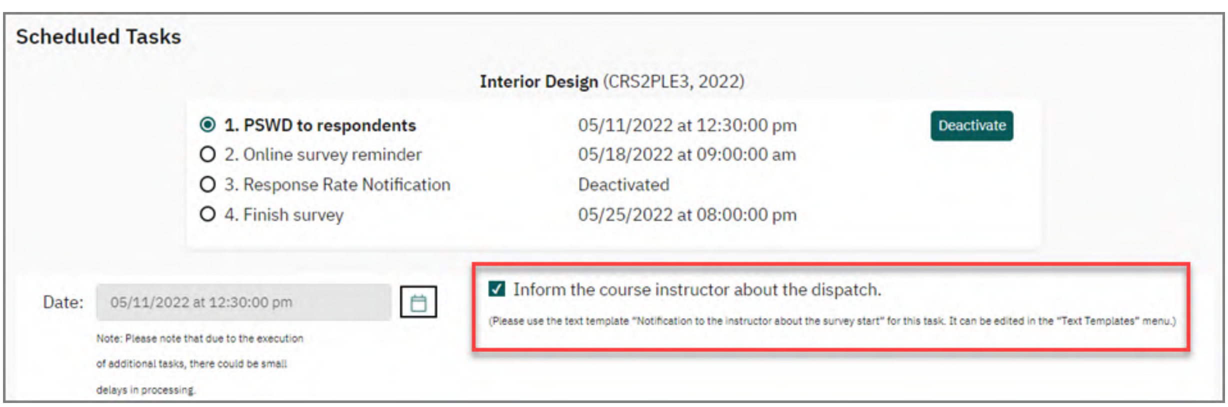


Figure 146: Send Shipping Information

- **Use of calendar**

  The calendar is used for selecting the date and time for a planned operation.

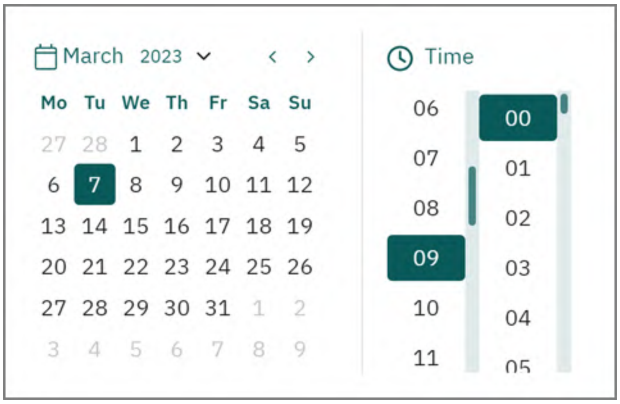


Figure 147: Calendar

All changes in the calendar are adopted by the enter templates behind the calendar. The calendar does not need a save button as it can be closed by “x” after selecting the date and time.

With a click on “?” a help function for the calendar is displayed.

Before saving check syntax of the email addresses (e.g. @). Technical limitations mean that the actual existence of the email addresses cannot be checked. Undelivered email can be found in the evasys logbook. The email addresses are saved in the system for reminder emails.

In general it is possible to assign the date/time and status for all selected surveys using the [Apply to All] button.

- **Operation “Online survey reminder”**

  The operation “Online survey reminder” is the dispatch of a reminder email to all respondents who have not yet taken part in the survey.

  In the reminder email you can send the login information once again.

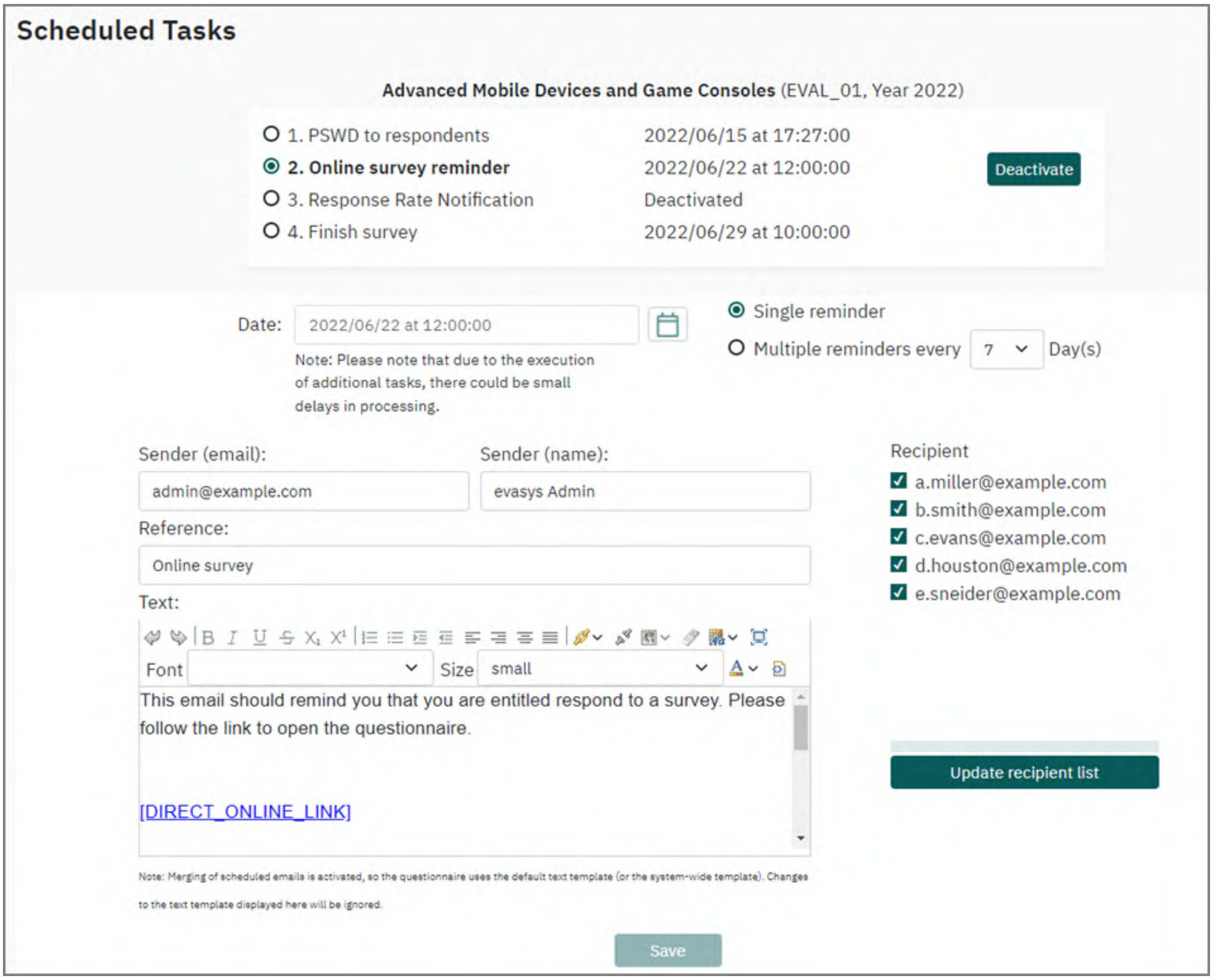


Figure 148: Online Survey Reminder

Optionally, more than just one reminder email can be sent. In this case, select the “Multiple reminders every x days“. The system will then keep resending reminders until the survey is closed.

After activating this operation, the fields sender email, sender name, subject line and email text can be edited. The recipients are automatically read out of the system, so that all participants who have not responded receive an email.

In the case of PSWD-based online surveys, participants who have not yet taken part in the survey will automatically receive an email. Participants who have already submitted the survey do not receive a reminder email.

The screen displays a recipient list which is empty when the scheduled task is created. As soon as the PSWD dispatch has been activated, it displays the participants who have not yet taken part in the survey and who are therefore included in the email distribution list for the reminder. The list is updated with each call.

In the case of Single Password online surveys, the system is not able to check, which email has already taken part in the survey, because all participants receive the same access code. For this reason, all participants are reminded, regardless of whether they have already participated or not. Therefore, the field with the recipient list is not displayed.

After defining the start date, you have to save the settings of the operation.

In general it is possible to assign the date/time and status for all selected surveys using the [Apply to All] button.

- **Subsequent editing of the participant list for PSWD-based online surveys**

  If participants of a PSWD-based online survey subsequently wish to be excluded from the reminder and not to be contacted further, you have the option of manually removing them from the participant list for the reminder.This function is available as soon as the initial PSWD dispatch has been activated via time control or manually.

  To subsequently remove participants, reopen the scheduled tasks of the corresponding survey and select the tab “Online survey reminder“. A list of recipients for the reminder is displayed. Only the participants who have not yet participated in the survey are listed here.

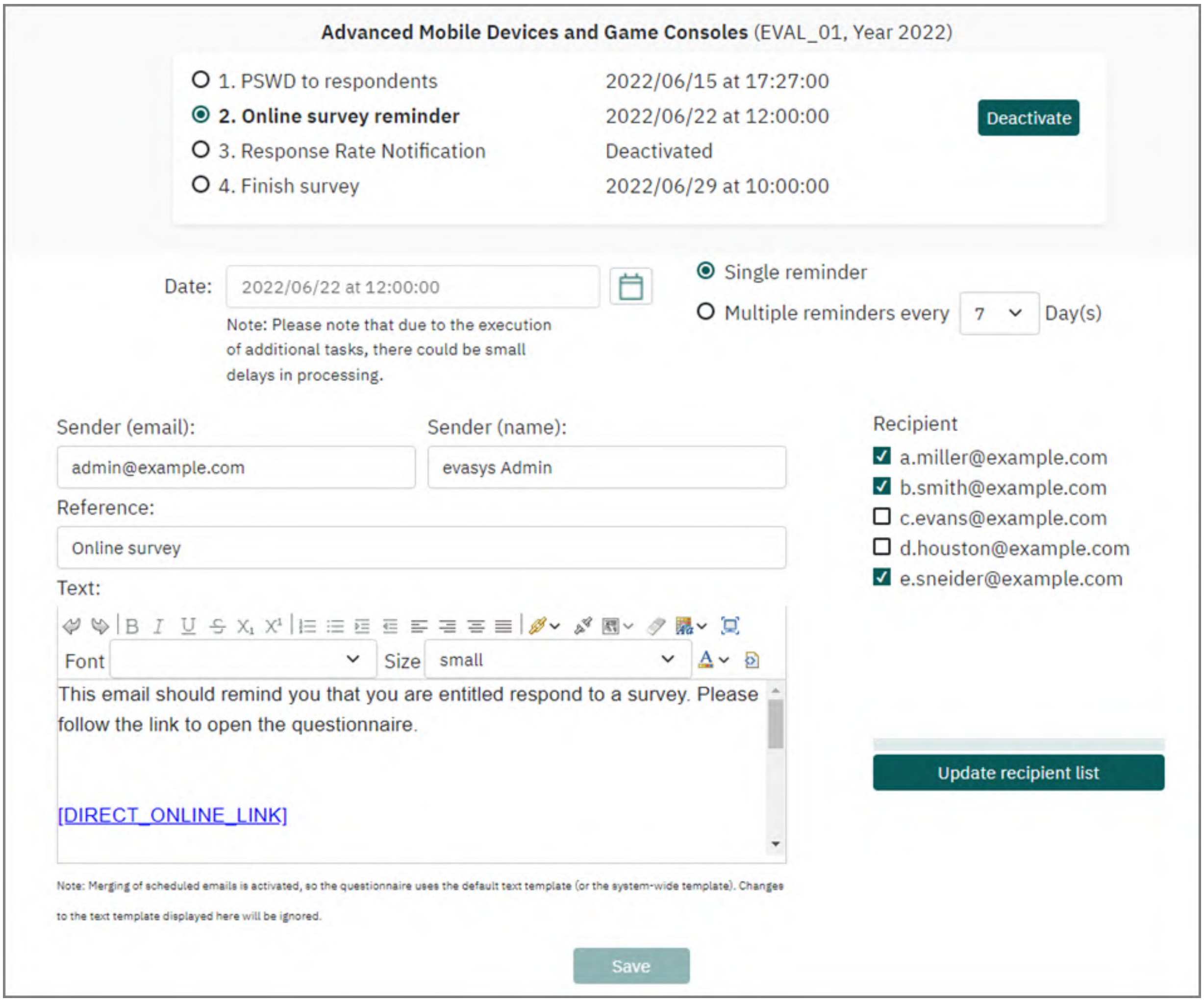


Figure 149: Exclude Participants from Reminder

To exclude a recipient from the reminder, deactivate the checkbox in front of the corresponding email address and click on the [Update recipient list] button to save your settings.

Note:
The participants are only excluded from the reminder email. The originally sent PSWDs remain valid. Participants can still participate via the link in the first invitation email. Please also note that this function is only available for PSWD-based surveys.

- **Operation "Response Rate Notification"**

  You can use "Response Rate Notification" to automatically inform one or more people if the response to a survey is below a certain value at a certain time. This allows you to take steps to motivate survey participants. You can use the calendar to select the time and date that this message should be sent, however it must lie between the first process "PSWD to participants" and the fourth process "End Survey."

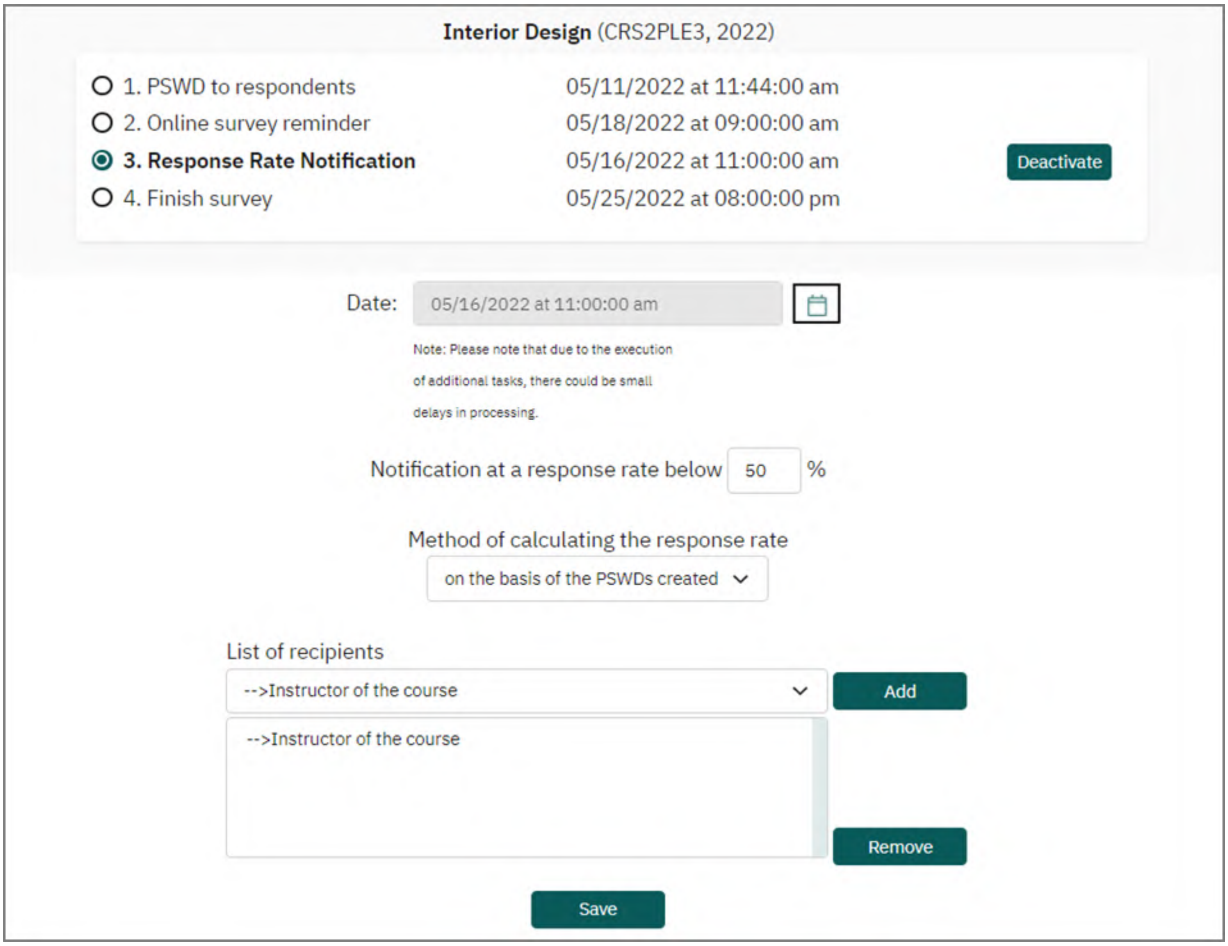


Figure 150: Response Rate Notification

The value, in percent, of the response rate which participation must be under in order for a message to be sent, can be set in “Notification at a response rate below”. Enter the relevant percentage value into the entry field.

The response rate is determined using the calculation method set in evasys Settings (Menu “System Settings/evasys Settings/Survey/Method of calculating the response rate”). You can choose a method other than the standard method using the drop-down menu.

In the case of single password based online surveys, the response rate can only be calculated on the basis of the number of participants.

Course Instructors, the Dean/Subunit Administrator for the subunit in question, and/or any other user in the system with an Instructor/Trainer, Dean/Subunit Manager, Administrator, or Subunit Administrator account can receive the message. Choose the desired recipient from the drop-down list and click [Add]. You can list more than one recipient if necessary.

Use [Save] to save the settings, and [Apply to All] to apply the settings to all other scheduled tasks currently being edited.

You can adapt the text for the email in advance by using the global text templates (Menu “System Settings/Text Templates”) or in the text templates for the relevant questionnaire ("E-MAIL: Notification at low response rate"). For more information on editing text templates, see chapter D 2.1. "Text Templates").

- **Operation "Finish survey"**

This operation serves to close the online survey.

When the survey is closed then no more returns are possible. Unused PSWDs are then invalid and cannot be used anymore. Survey participants are not informed of this operation.

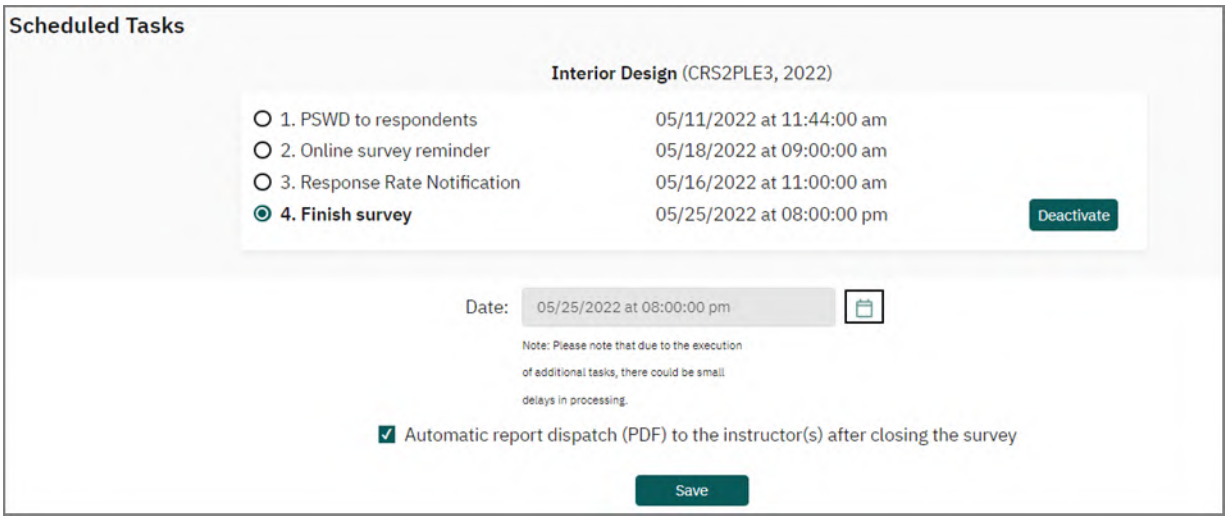


Figure 151: Finish Survey

The evaluation report can be sent directly to the survey owner. When this is the case then the owner of the survey (i.e. the user allocated to the survey in the system) receives an email of the results of the online survey automatically.

This operation is terminated by a start date and saved with [Save]. In general it is possible to assign the report delivery date/time, activation status and setting for all selected surveys using the [Apply to All] button.

If required, you can delay the dispatch of the report, i.e. you can set up a buffer time between the completion of the survey and the report being sent. This can be useful if you want to wait for the end of the examination phase before sending reports, or if you want the administrators to view the reports first.The time delay can be set globally or partially in the central evasys configuration in the area "Survey Online" via the switch "Delayed Report Dispatch". Here you define the time delay in days after completion of the survey.

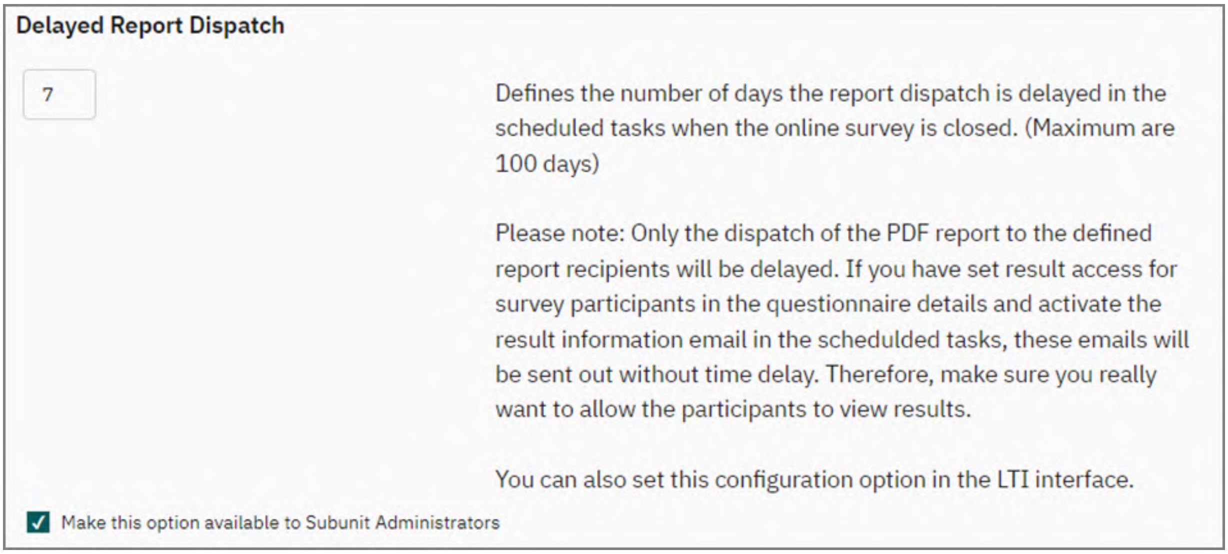


Figure 152: Delayed Report Dispatch

If a time delay has been activated, a message appears in the scheduled tasks.

If you allow result access for participants (chapter), a checkbox is displayed in the case of PSWD-based online surveys, which can be used to activate an invitation to the participants to view the results. In the area below the checkbox you can also edit the invitation text individually.

Please note that the invitation to access results can only be activated for PSWD-based online surveys. In the case of single password based online surveys, this option is not offered.

- **Scheduled Online Survey Overview**

  In the “Subunit” menu, under “Scheduled Tasks”, you can view and manage all the scheduled tasks for online surveys

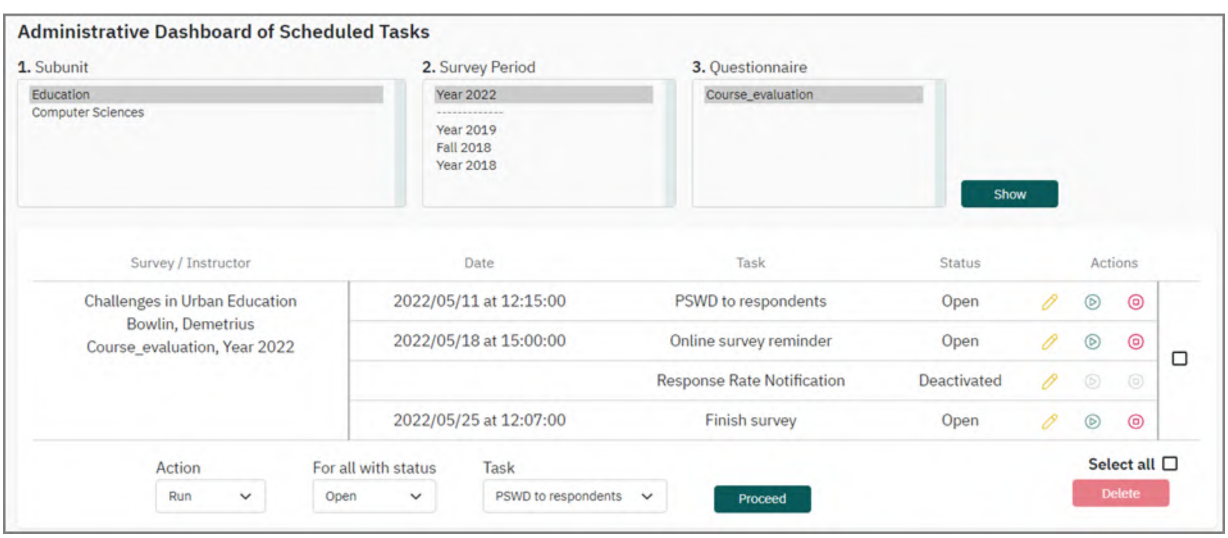


Figure 153: Scheduled Tasks: Overview

The display of subunits, survey periods and questionnaires can be restricted.

For each survey, each of the three tasks are displayed in one line. In the column “Status”, the status of the task is evident.

The following status messages are displayed:

- Open – The task is activated and not yet carried out
- Running – The task is now running, emails are being sent.
- Deactivated – The task is deactivated
- Executed – The task has been successfully completed
- Executed with error – The task was completed with error
- Executed with warning – The task was completed but with a warning (e.g. “report could not be created as data was not available”)
- Not completed/with error– The task is not correctly defined and the settings should be checked

Via the buttons in the column “Actions” the planned processes are controlled. The following functions are available from the left to the right:

Figure 154: Scheduled Tasks - Actions

- **Edit**

  Click the edit symbol to retrospectively edit the scheduling data. Here it can be decided whether the changes made should be applied to all surveys created at the same time, or only to those surveys currently selected.

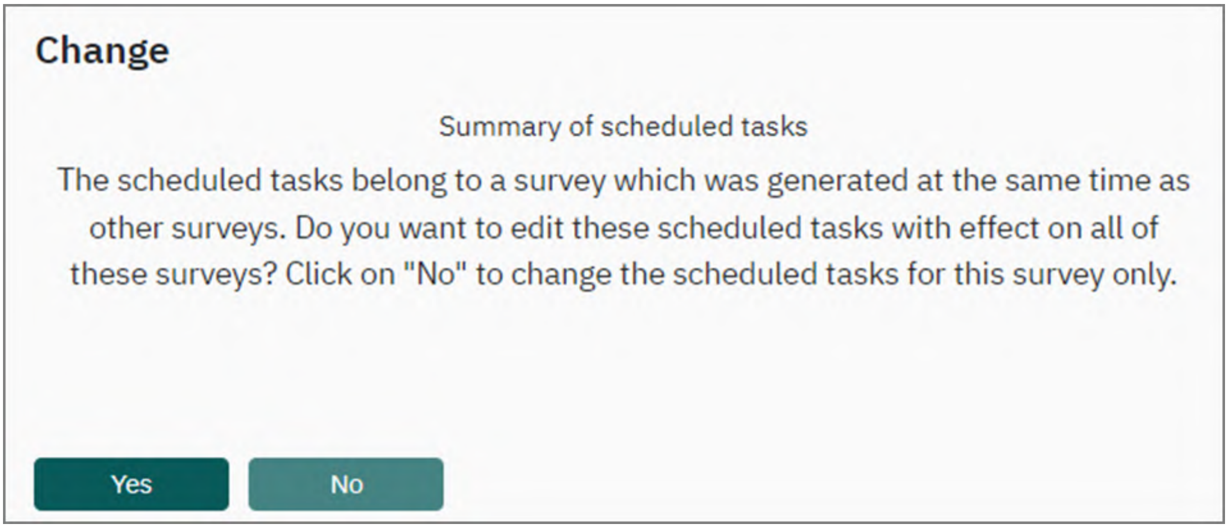


Figure 155: Scheduled Task: Apply changes to all surveys generated at the same time

- **Run**

  Runs the task directly and thereby overrides time scheduling.

- **Deactivate**

  Deactivates a single task, i.e. it will not take place at the scheduled time.

- **Select for deletion**

  By activating the checkbox you can select the scheduled tasks for single surveys and delete them. If you click the [Delete] button, the time schedule will be deleted. If you select the “Select all” checkbox, all scheduled tasks can be deleted at the same time. Please note: Only the scheduled tasks will be deleted, not the surveys.

Actions for all surveys with a definite status can be directly performed by selecting from the footer. In this way, for example, all surveys with the status “deactivated” can be edited.

In the drop-down list “Action” you can choose between the actions “Edit”, “Run”, and “Deactivate”. The tasks on which this action should be performed, and with which status, are set in the second drop-down list box. Different statuses are visible here, depending on the selection in the box “Action”. To which task the selection applies can be defined in the last drop-down list “Task”.

In this way, for example, all deactivated tasks in the section “Finish survey” can be edited immediately. Or all open task can be immediately performed, or deactivated.

Tip:

Direct links to the online survey can be displayed in the respective participant's account through an interface to a Learning Management System (LMS) like for instance Moodle or StudIP. The time control function is used to define when and how long a survey link is displayed in the participant's LMS account. Please note the following: There is a small time gap between the moment the survey is created and the time control for sending PSWDs to participants is defined. During this short gap, the link to the online survey might be displayed in the participant's LMS account when using the default evasys settings. So if you use an interface to an LMS system, please activate the option “Prevent premature display of surveys in LMS” in the evasys Settings, section “Survey Online”. For further information please refer to chapter D 2.5.4. “Survey Online”.

3.11. Integrate Online Surveys into Learning Management Systems (LMS)

Many universities use learning plattforms such as Moodle, Blackboard or Canvas to provide students with learning content and information on their courses. An interface to a Learning Management System (LMS) enables you to display content from evasys, such as a link to an online survey, in the student account. Time control offers the flexibility to define how long students can access surveys through their accounts.

From a technical point of view, there are various connection options for LMS systems available. Data can be transferred both via an LTI interface as well as via the SOAP API. evasys GmbH provides so-called connectors and plug-ins for various learning platforms, which can be used to easily implement a connection. With a special “Moodle Plug-in for evasys“ for example, a Moodle block on the Moodle homepage in the student account can be placed, which lists the available evasys surveys and allows direct access.

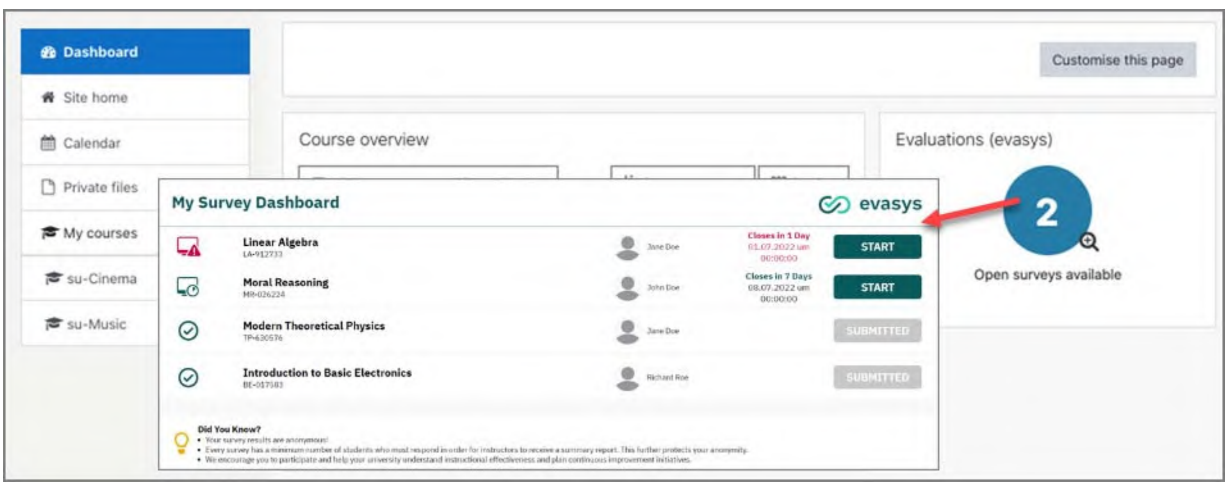


Figure 156: Display of Surveys in Moodle

For further information on the integration of evasys with Learning Management Systems, please consult the evasys Technical Guide.

3.12. Online Survey - Password Based

Password-based surveys are often used for obtaining the opinion of an unidentified group of participants. It is advisable to customize the password in the details after creation of the survey. There are a number of methods of setting the password and access address on the server. The QR code allows completion of the online questionnaire with mobile devices.

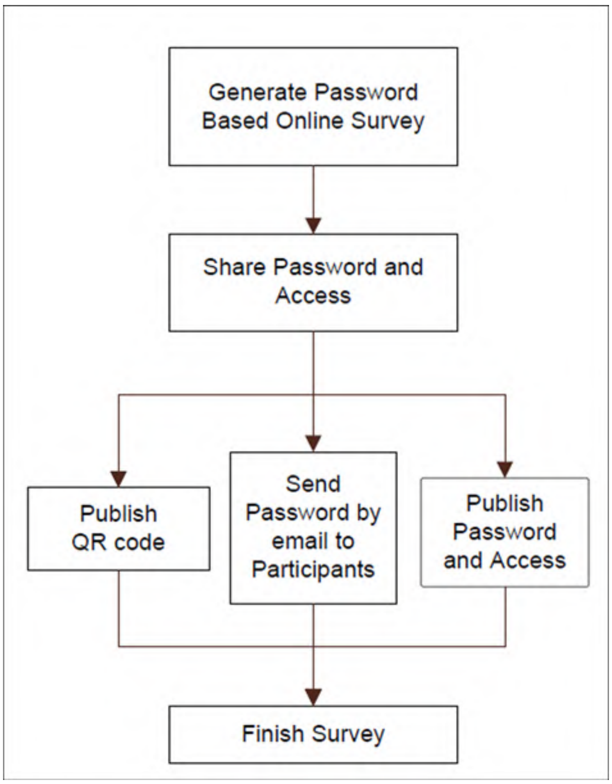


Figure 157: Password-based online survey procedure

For single password surveys which are to be created directly, you can predefine the method of creating the general password in the system settings ("System Settings/ evasys Settings/Survey Online/Creating Passwords for Single Password Surveys). You can either decide to use the contents of user defined course fields or the course ID or the system can create a password in PSWD format. Please note: A single password has to be system-wide unique. Should this not be the case when using contents of course user data fields, a password in PSWD format will be created instead. Single passwords may not contain blanks. These will be automatically converted to underscores.

If a PSWD-based online survey is to be subsequently converted to a single password survey, the PSWD-based survey may not yet have respondents. Click the name of the PSWD-based online survey to access the details. In the section "Actions" click the option "Convert to password based survey".

It can be adapted for single password surveys which have been converted from PSWD-based surveys as well as for single password surveys created directly. Click on the option “Change password”. This opens a dialog where you can enter the new password.

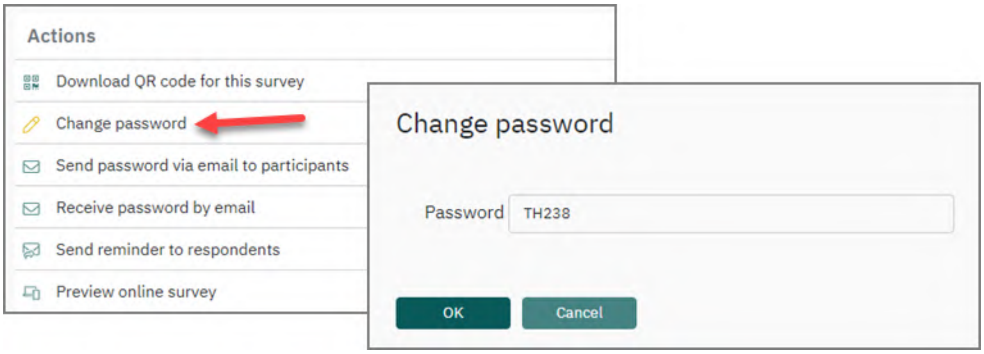


Figure 158: Change password

Now, if desired, and as long as the group of participants is known, the password can be sent to these. Click on the option “Send password via email to participants”. This opens an input window. In the field “Recipient” all email addresses that have been imported for the course are shown. If no addresses were imported, they can also be deposited manually afterwards. Click on [Submit] to start the sending.

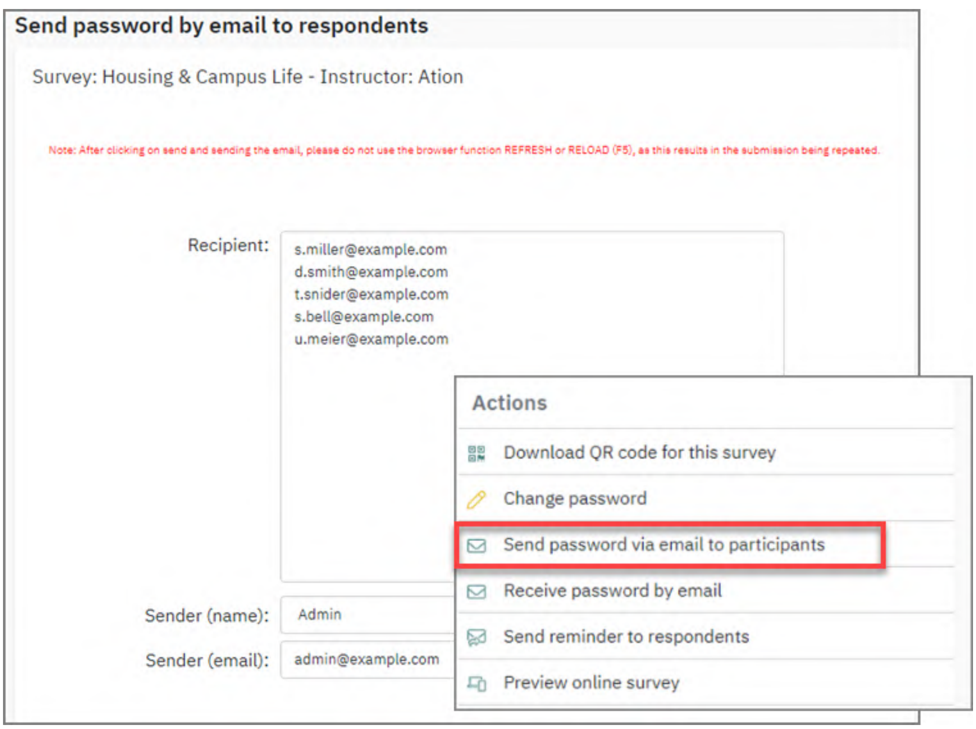


Figure 159: Sending passwords to participants

If the password is to be made available as a QR code, then please refer to chapter B 3.15.6. “Application of QR Codes”.

3.13. Comparison of Online Survey Procedures

The following comparison shows the differences in three online survey procedures.

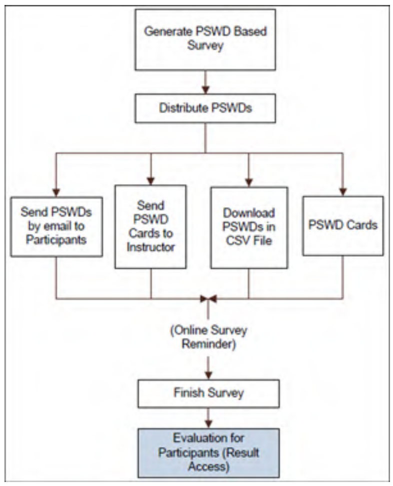
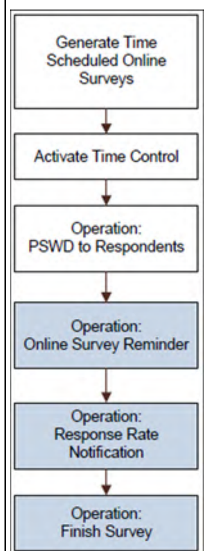
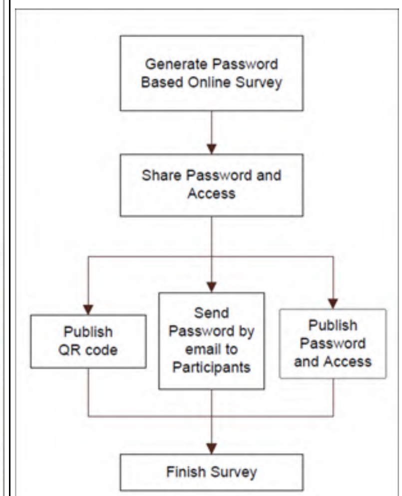
	PSWD-based online survey	PSWD-based with time control	Password based online survey
			
Access	PSWD	PSWD	Password
Online Survey Preview	Yes	Yes	Yes
Automatic Procedure	No	Yes	No
QR code	Yes/PSWD card	No	Yes
Multilingualism	Yes	Yes	Yes
Insight into the results for survey participants	Yes	Yes	No
Online Presentation Adjustment	Yes	Yes	Yes

Table 6: Comparison of Online Survey Procedures

3.14. Conduct Online Surveys in Class

The implementation of online surveys in class combines the benefits of paper-based surveys with those of online surveys. The presence of participants allows a high response rate to be achieved, similar to paper-based surveys, while avoiding the need to print and scan by using mobile devices.

In class-surveys can be realized in various ways:

- As a single password based survey, by projecting a QR code in class. A time limit can be set by using time control.

- As a PSWD-based survey, by asking the participants to access their email mailbox or Moodle account via their mobile device during the event and to open the link to the survey.

Please note that a mass implementation of in-class online surveys imposes a much higher load on the evasys server and a temporarily heavy load on the in-house WiFi network. Before you change your evaluation procedure to in-class evaluation, please ask your IT to check the availability of the wireless network and whether the server meets the system requirements.

Further information on the technical requirements can be found in the evasys Technical Guide.

3.15. Instructions for Online Surveys

3.15.1. Preview Online Survey

You have the possibility of displaying a preview of your online survey, either in the details of a survey or in the questionnaire details.

In the details of a survey, as you can see in the following graphic, click in the area “Actions” on “Preview online survey”.

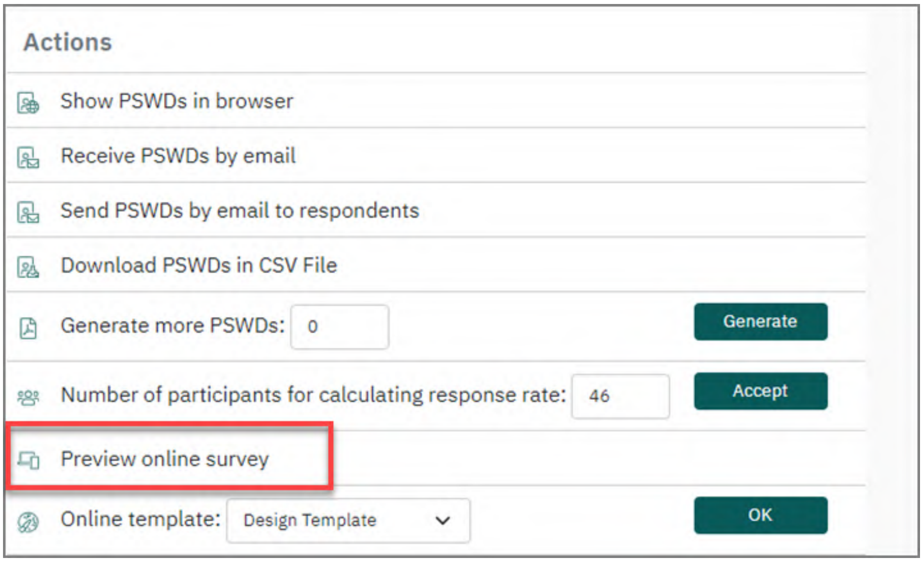


Figure 160: Preview of an Online Survey in the Survey Details

You can also display a preview of your online survey in the details of a questionnaire by clicking on “Preview online survey”.

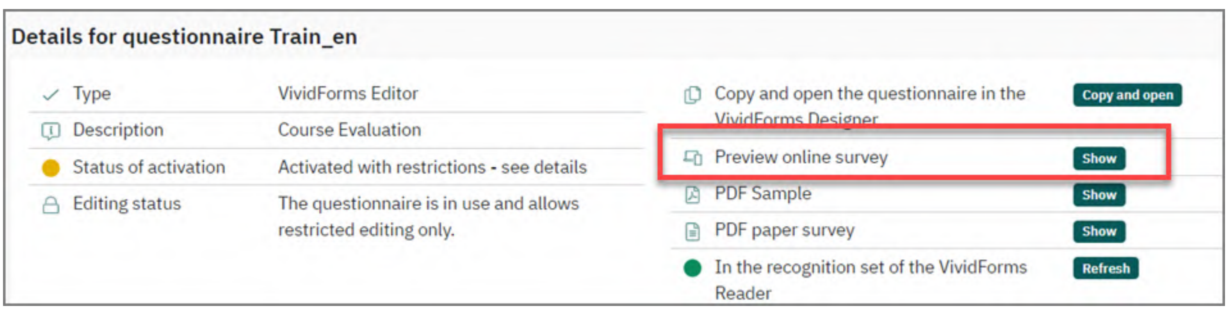


Figure 161: Preview of an Online Survey in the Questionnaire Details

In both cases (calling up the preview of your online survey in the survey details or questionnaire details) you will receive the following warning:

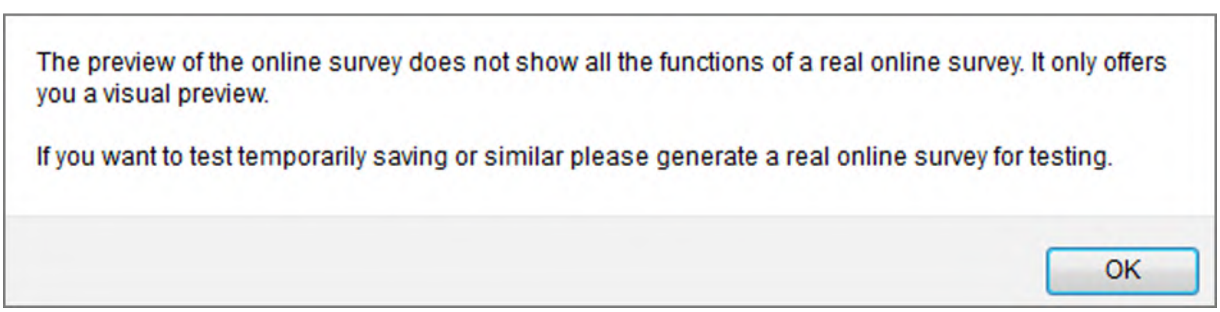


Figure 162: Warning Message of a Preview of the Online Survey

This warning makes you aware that the preview of your online survey is not a real online survey, but solely offers you a visual preview.

Hint:
In order to test filters, cross tabulations or temporary saving, we recommend that you create a test survey with your questionnaire. When you have created the test survey, display the PSWDs in the browser and fill out the survey once. This procedure allows you to fully test your online survey. On successful completion, you can delete this test survey and create your regular online survey.

3.15.2. Customization of the Used Layouts

The layout of online surveys in evasys is handled by online templates. A template is a sample, that in this case, for example, controls the color, the insertion of logos or the questionnaire display.

In evasys there are several types of online templates:

- **Predefined standard templates**

  The predefined standard templates are firmly integrated in evasys and are used as the default for online surveys. There are two different templates preinstalled:

  - The “evasys Online Template”, which is the preset template for all surveys in evasys. This template provides barrier free surveys regarding WCAG Level AA.
  - The “Design Template”, which has a more modern look.This template provides barrier free surveys regarding WCAG Level AA, too.

- **Customized online templates**

  The customized online templates can be created in evasys without any previous technical knowledge or knowledge of programming. They can base on either the “evasys Online Template” or on the Design Template”. The colors of these online templates can be adapted to your wishes/your corporate design. In addition, an individual logo can be integrated, too.

  You can create any number of customized online templates and use them for each subunit and even for each survey individually. Also subunit administrators can define their own customized online templates as long as the evasys-administrator grants the right to do so.

- **Additional/ individual online templates**

  Online templates created outside of evasys as well as templates provided by evasys GmbH can be uploaded into the system via the online template management.

  You can also program your own templates, if required. This can range from a simple customization of the layout by modifying the CSS file to complex logics which can be realized using e.g. Java Script. For further information please refer to the evasys Technical Guide and the SOAP API and Plug-in manual.

When using standard templates or a customized online template based upon the standard template, the size of the template is automatically optimized for the screen resolution of the client, that is, as well as PC's, mobile devices too (cell phones, smart phones, internet tablets etc.) are supported. All other templates must be adapted for display on mobile devices.

All kinds of templates are organized in the menu "System Settings/Online Templates". Here you can view and edit existing templates or create and upload new ones.

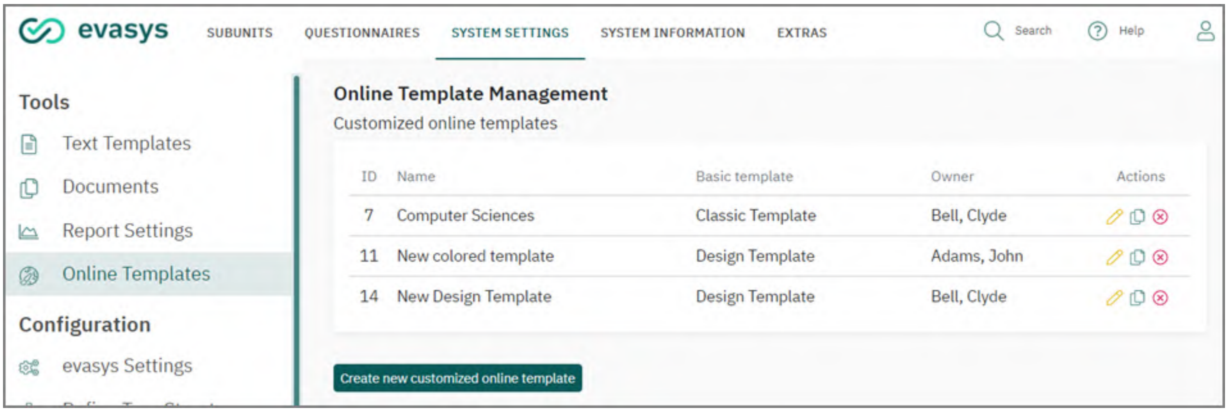


Figure 163: Menu "Online Templates"

Creation of a Customized Online Template

To create a so-called customized online template, open the menu "Online Templates" in the main menu "System Settings". The online template management opens automatically:

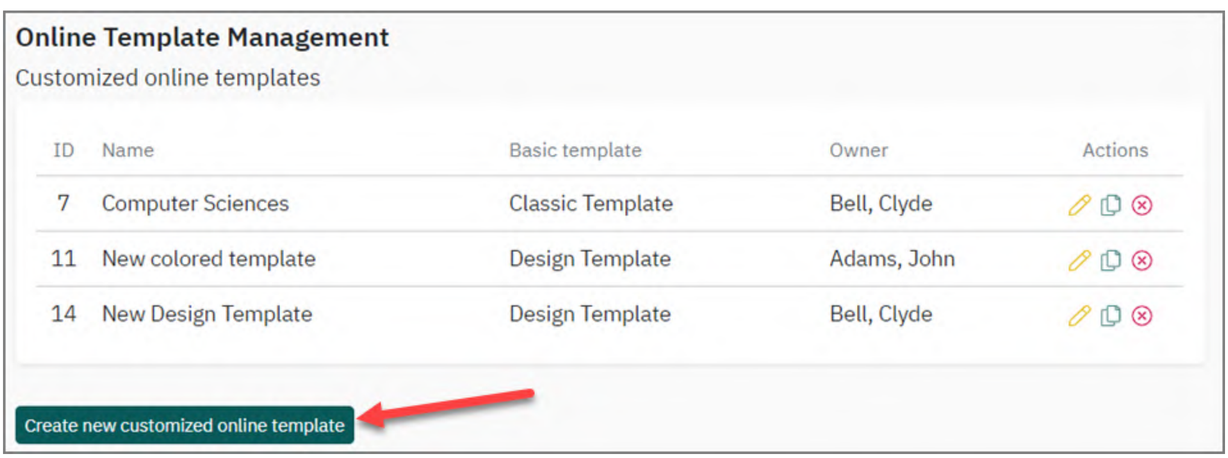


Figure 164: Online Template Management

Predefined templates can be uploaded in the bottom area of the window. In the upper area of the window, customized templates are created and managed.

Click on [Create new customized online template]. You first have to choose the basic template on which the new template should be created:

- On the design template (modern look, no accessibility)
- On the evasys Online template (accessibility according to WCAG level AA possible)

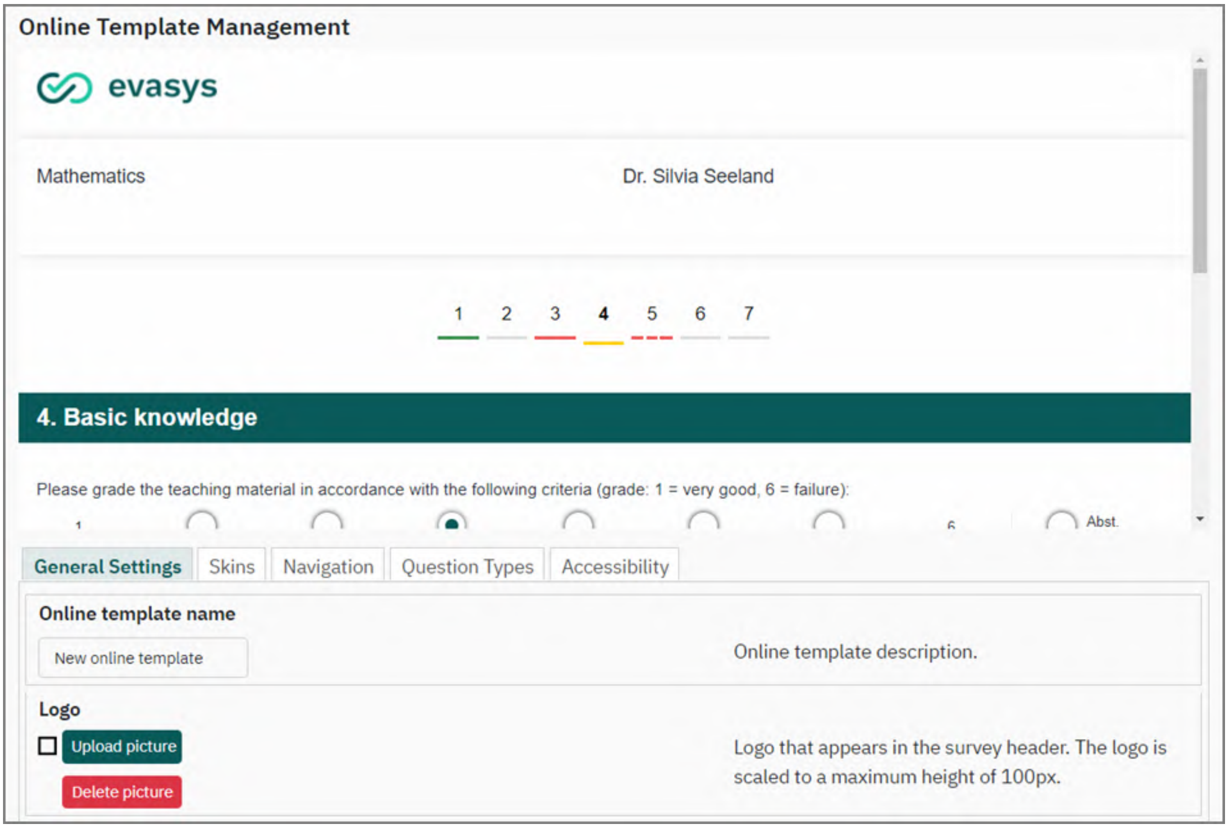


Figure 165: Customized Online Template: Create Template

In the upper half of the window, a preview of the online template is displayed. In the lower half the layout of the template can be edited. If you are using a wide screen (1680px and wider), the settings area is displayed to the right beside the preview window so that you can check any possible changes directly.All changes made to the layout are immediately shown in the preview.

Numerous functions for customizing the templates are available in five different tabs:

- **General Settings**

  The name of the template is defined here, your own logo can be uploaded and aligned, the organization's logo and the survey header can be shown or hidden etc.

  If desired, the default login image can be substituted by a custom image. The image is displayed when participants enter their PSWD or password to log into the survey. Please note, that the file has to be in jpg, png or gif format and has to have a resolution of 291x251px. Different sizes are scaled.

Figure 166: Login Image for Online Template

Here you can enter an individual farewell message displayed in user's browsers once they have completed the online survey. In order to use this function, you must switch the settings to “Individual message.” You can then enter your own HTML text. In the editor, you can use RTF format (bold, italic, underline), adjust the color of the text and include even hyperlinks for forwarding to any website.

Figure 167: Farewell message after survey completion

At last, you determine the overall direction of your own completion message. The final message is limited to a width of 700 pixels or 80% of the screen. It appears after the participants of your online survey are submitting.

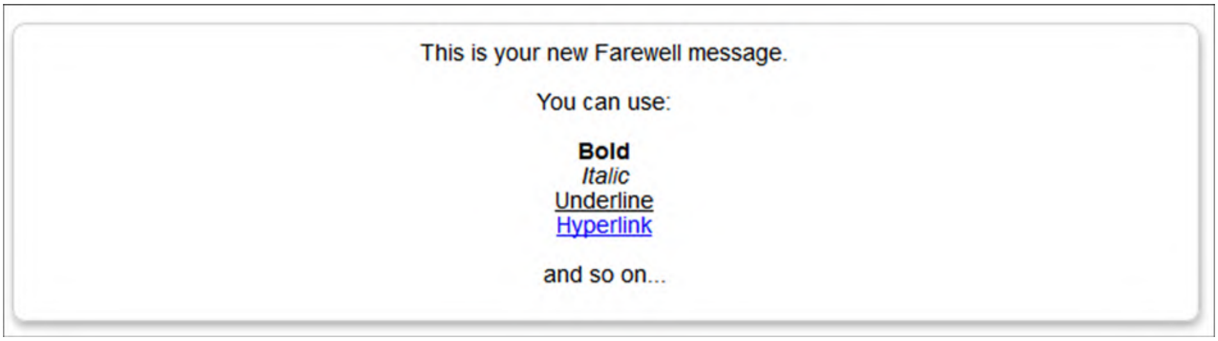


Figure 168: Farewell message

A text can be defined using the “Message when survey is closed“ section, which is displayed to the online survey participants if the survey has already been closed. It then replaces the default text.

The options “Imprint“ and “Data privacy information“ allow you to include a link to your imprint and your data privacy guidelines in the footer area of the online survey. Enter either a link to your imprint or the complete text of the imprint. If you provide a link, the participants will be redirected to your page in a new browser tab after clicking on "Imprint". If a complete text is entered, it will open directly in a new browser tab.

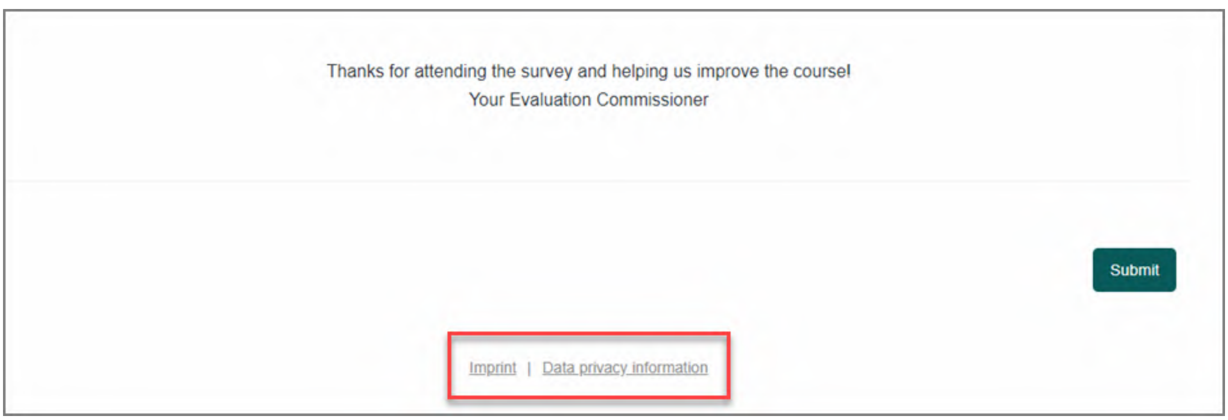


Figure 169: Imprint and Data Privacy Guidelines in the Online Survey

Filtering of questions with defined question texts

The extended online template for evasys offers the possibility to assign answers to open questions to content in user-defined participant data fields. This can be useful if short answers from respondents, referring to courses the respondent has attended, are to be collected across all courses.

Prerequisite for using this function are non-anonymous online surveys with participant imports where content is imported for at least 1 of the possible 20 user-defined data fields.

In addition, a questionnaire is required which contains at least one open question, the question text of which is extended by the placeholder [PARTICIPANT_CUSTOMX] (the "X" is replaced by the number of the respective participant data field).

Example:

One participant attended the courses "Geometry in Architecture", "Linear Algebra for Statics Calculations" and "Urban Planning in the 20th Century". Another participant, on the other hand, takes courses in "Spanish", "Spanish Literature" and "Development of Romance Languages". Within a single questionnaire, the participants' assessments of the respective courses will be collected in the form of short answers to open questions.

Evasys will be set up accordingly and a questionnaire as described below will be designed.

Setup in evasys

A course with non-anonymous participants is required. The participants are imported in the following format:

e-mail	name	prof_title	firstname	title	adress	datrafield 1	datafield 2	datafield 3
test1@lab.evasys.de	Template		Teresa	Mrs		Geometry in Architectur	Linear Algebra for Statics Calculations	Urban Planning in the 20th Century
test2@lab.evasys.de	Sample		Simon	Mrs		Spanish	Spanish Literature	Development of Romance Languages

Table 7: Import

Generating a questionnaire

In the VividForms Editor, the questionnaire is then created as usual. For the short assessments of the courses in which the respondents participated in the example, open questions are added at any position in the questionnaire.

In the question text of the open questions, it is important that the correct placeholder is specified in square brackets [] to evaluate the respective participant data field. For example, if you want to evaluate the 3rd participant data field, you can formulate and construct your question text as follows:

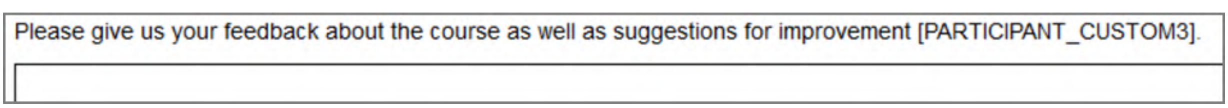


Figure 170: Sample Question

Configuring the Extended Online Survey Template

In the details of the new, extended online template, the filter for open questions is located at the very bottom of the first tab "General Settings".

In order to be able to use the filters of open questions in the extended online template, it is essential to enter **the exact question texts** in the input field of the function. In contrast to the questionnaire, it is important for the template to enter the placeholders **in curly brackets {}**.

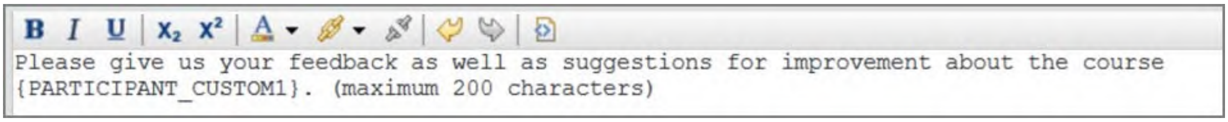


Figure 171: Entering the question textt

> **Tip:**
> If the same question text is used for all open questions on the questionnaire, the numbering of the placeholder can be omitted. In this case it is sufficient to set the placeholder without numbering - like this: {PARTICIPANT_CUSTOM}.

Generating a survey

After the course has been prepared with the import of the non-anonymous participant data and the questionnaire has been created, the survey can now be created for this purpose. For non-anonymous surveys, it makes sense to invite the participants by email to vote and participate in the online survey. This can be done either by using the scheduled tasks or by sending "PSWDs by email to respondents".

After clicking on the link in the email, the respondent will be forwarded directly to the correct survey. Here, the placeholders for the participant data fields are now filled with the values that were stored for the respective participant.

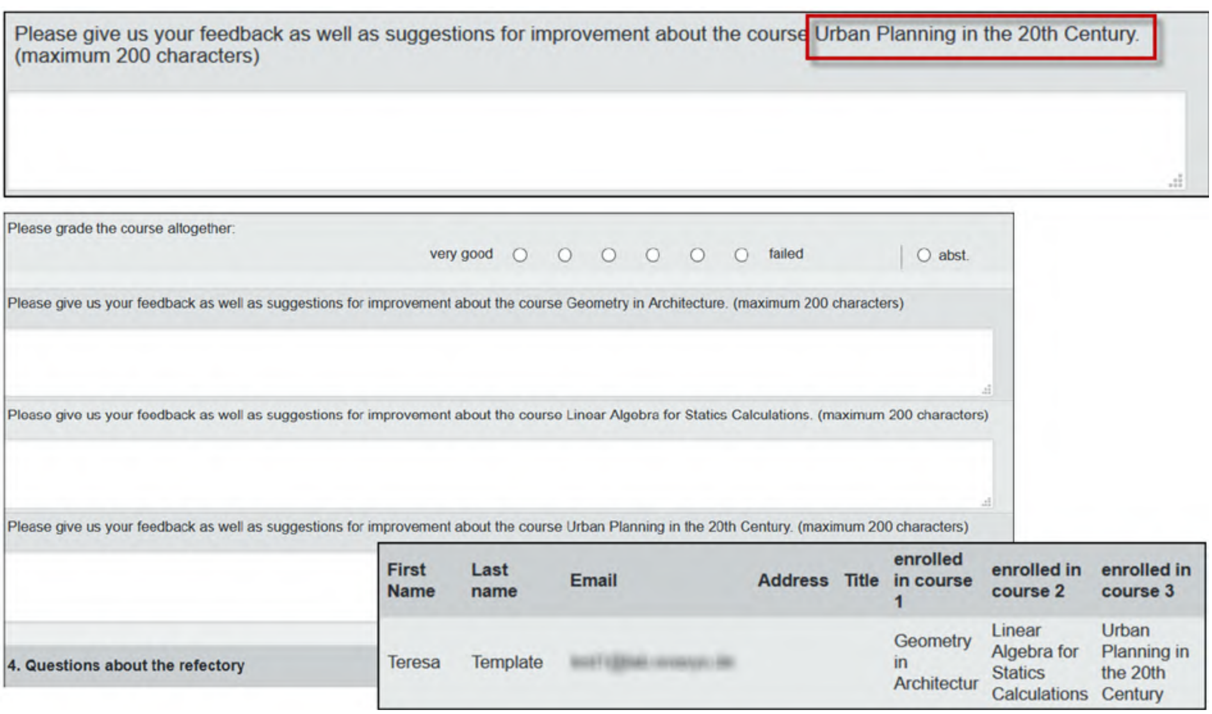


Figure 172: Filtering with defined question text

In addition, the participant will only be shown the questions for which the placeholder could also be filled with content from the participant data fields. If no values are stored in the data field, no question is displayed.

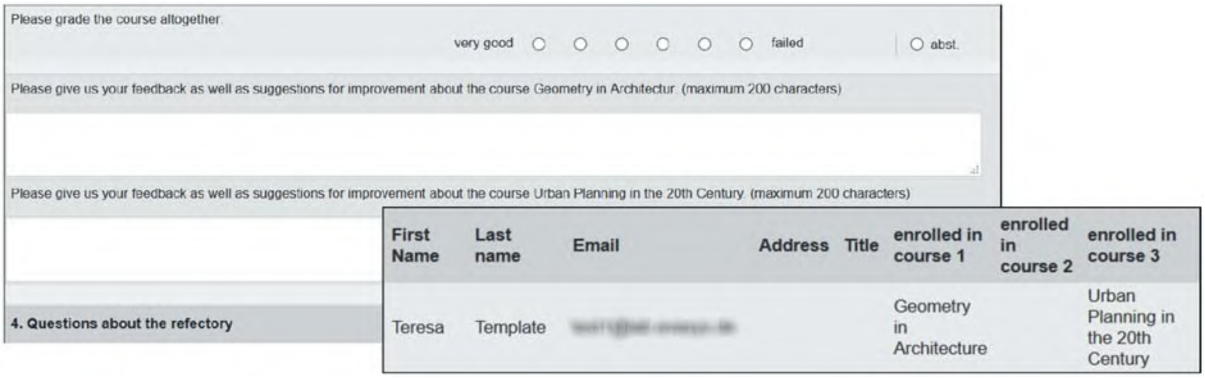


Figure 173: Filtered question

Multilingual questionnaires:

You can also use a multilingual questionnaire. The translation of the question is indicated by a pipe character "|" placed separately from the original question text in the template.

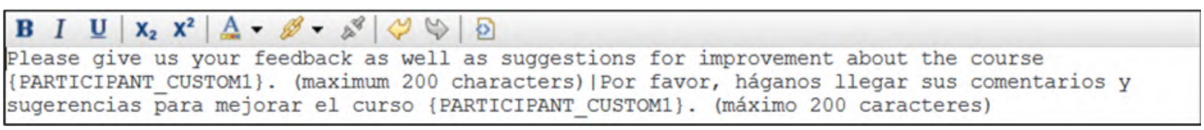


Figure 174: Multiple language filter text

It is also possible to define questions with different wording in the extended online template. Also in this case, the questions are entered into the input field separated by the pipe character.

Use of the character counter for open questions

If the open question includes a limitation of the characters to be entered, the online survey will automatically display a corresponding message behind the question text. It is not necessary to enter the hint manually in the question text. In this case, however, it is necessary to enter the automatic hint about the maximum characters also in the configuration of the template. Otherwise the corresponding question will not be hidden if the course is not attended because the question text is not identical:

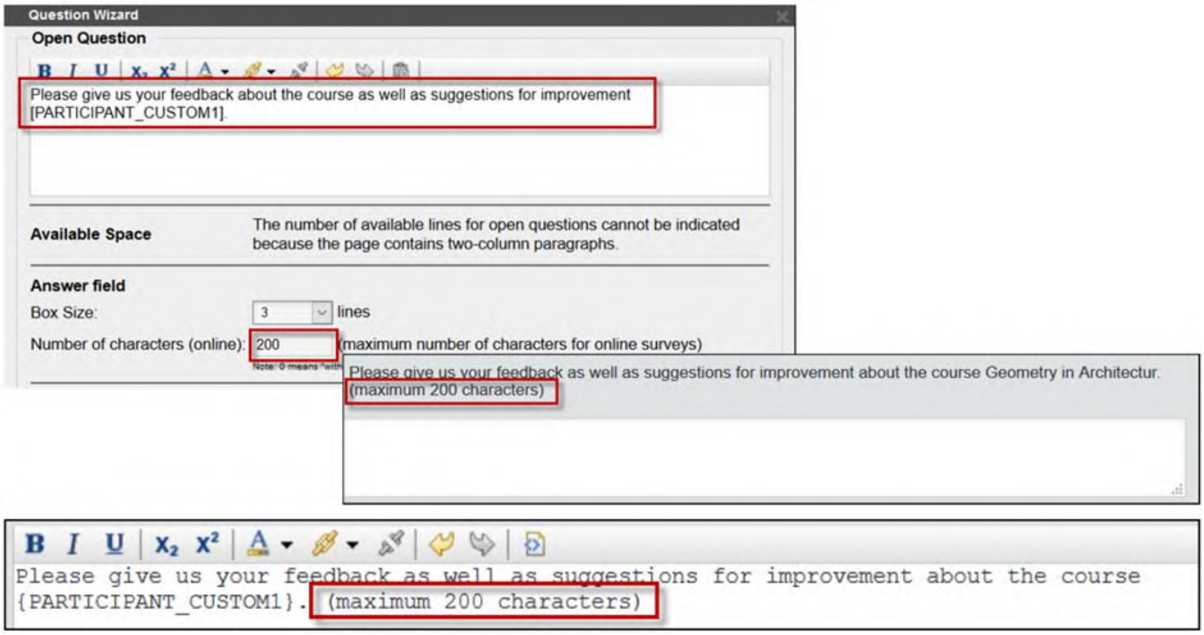


Figure 175: Integration of a character counter

The question text displayed afterwards in the online survey must always be identical to the text stored in the template. This also applies if further text follows after the placeholder. For example: “Please give praise and criticism to the event [PARTICIPANT_CUSTOM2] as well as suggestions for improvement.”

Tip:
Using the "Online Preview", the exact note can be copied to the clipboard and pasted into the settings of the extended online template.

Filtered open questions in PDF report and data export

In order to assign the answers of the respondents to the correct courses, the content of the participant data field used in each survey is output in both the PDF report and the exports, preceded by the respondent's answer. It should be noted that the open question is displayed with the question text that was created on the questionnaire, including the placeholder.

In the following segment of the PDF report, the answers are displayed with the respective value of the participant data field in order to facilitate the assignment to the respondent and his course (red = part. 1 with two questions; green = part. 2 with three questions).

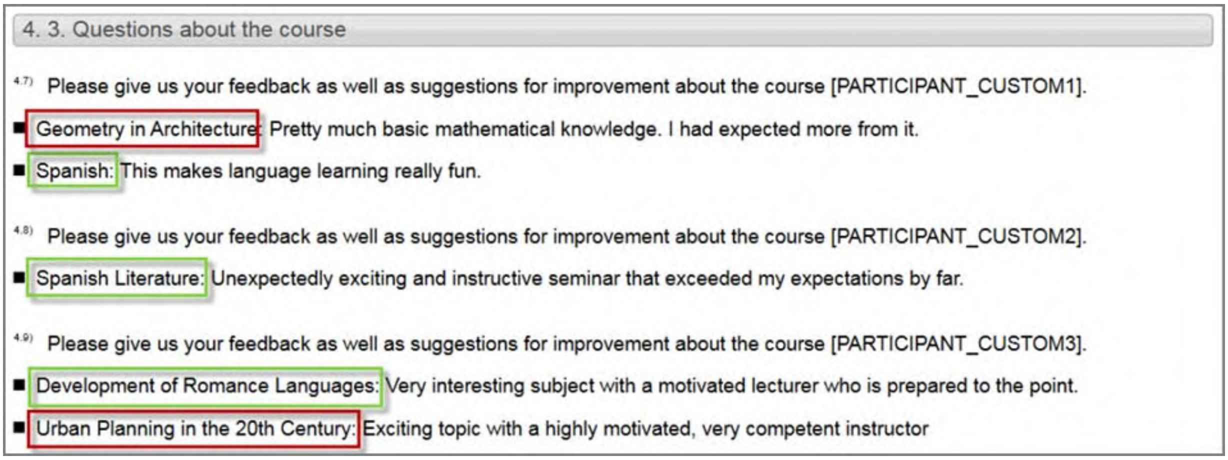


Figure 176: Filtered questions in the PDF-Report

Also in the raw data exports the values of the respective participant data fields are prefixed to the answers.

- **Skins**

  A color scheme for the online template can be chosen in the “Skins” tab from different pre-configured sets. The result is shown immediately in the preview window. If necessary, the colors of individual areas and elements of the template can be additionally adapted using the advanced color settings in the lower area.

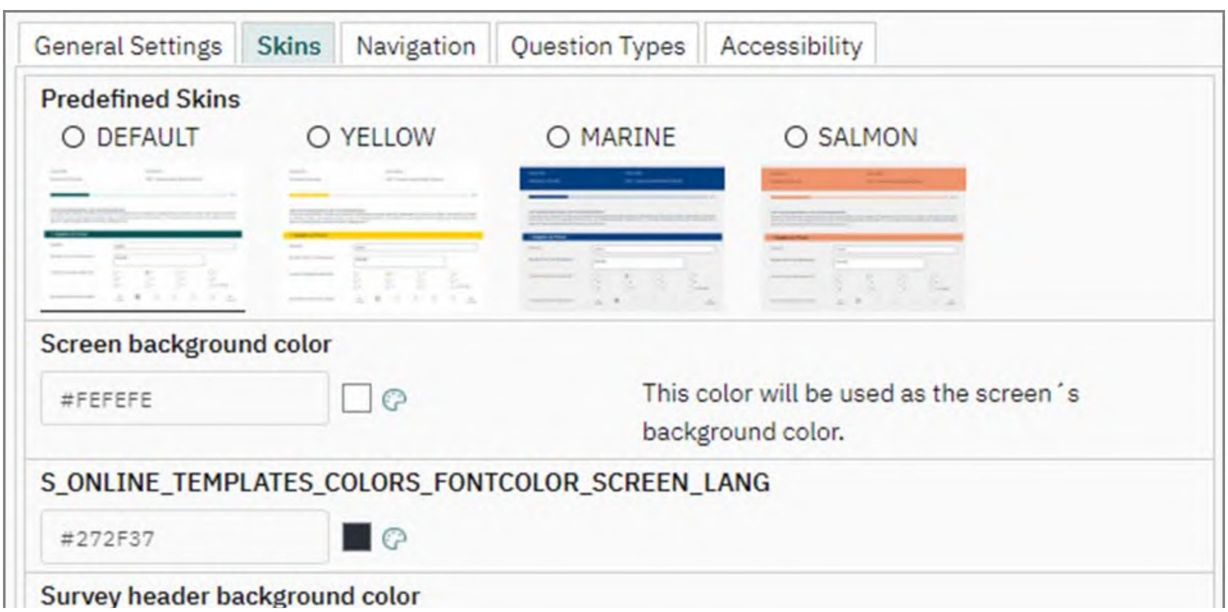


Figure 177: Customized Online Template: Customize colors

> **Note:**
> If you have undertaken adaptations on individual colors and afterwards change the color set, the adapted colors are not taken on but rather reset to the standard values of the new color set.

- **Navigation**

  Different elements, such as the page navigation or the progress bar can be shown or hidden here. If you deactivate the **page navigation**, the tabs for controlling the chapters are hidden. Participants can then only switch between chapters using the [Next] and [Back] buttons. If the option “**Do not allow access to hidden pages**“ is activated, it is not possible to access pages which have been filtered out completely. A **progress bar** visualizes the progress in the survey. The **error overview** page lists errors which have been made while filling out the form when the questionnaire is being sent (required questions which have not been filled out, for example). The calculation method of the progress bar allows you to choose whether the status of the bar is calculated based on the number of questions filled in (default) or based on the number of pages/question groups. The latter option can reduce or avoid jumping of the state if filter questions were defined for the questionnaire.

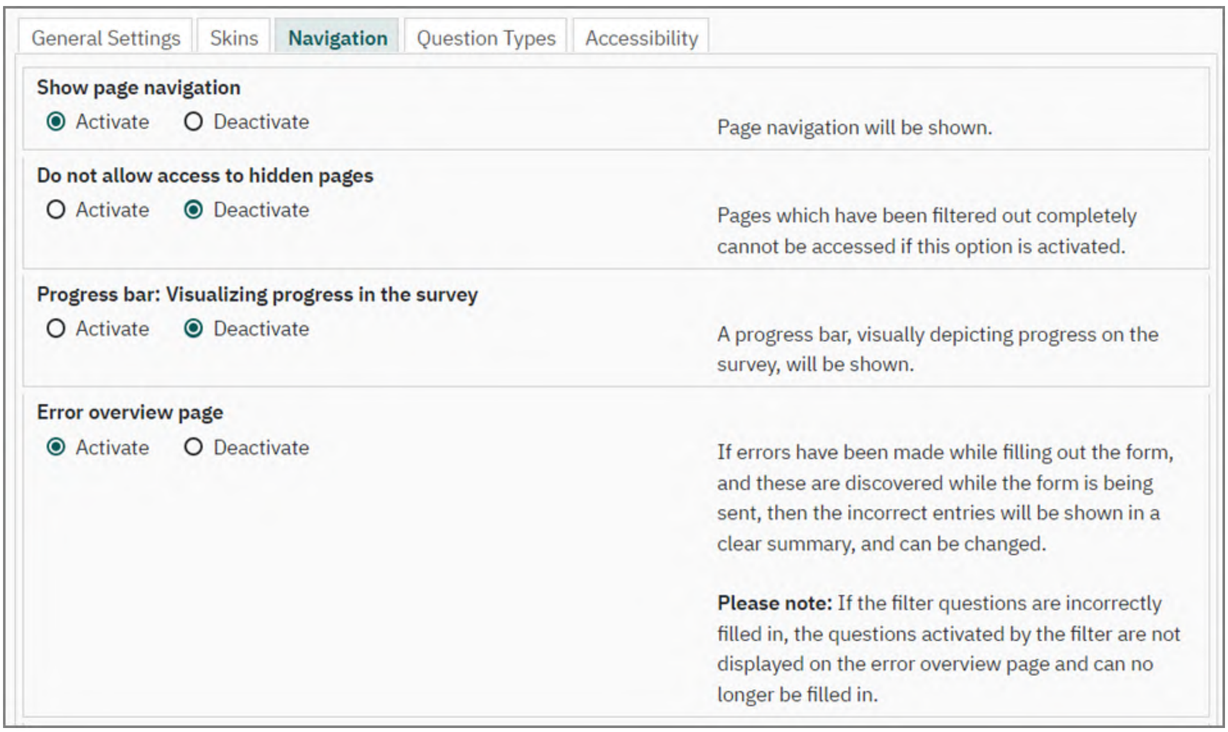


Figure 178: Tab Navigation

- **Question Types**

  Specific settings for different question types can be made here. If the option “**Remaining character counter for open questions**“ is activated, open questions will include a remaining character counter, which displays how many characters from the maximum character limit remain, provided you have defined a character restriction in the open question wizard. If you allow the “**Deselection of answer options**“, answers to a question can be deselected by clicking on the answer once more.This option is not activated by default.

  When choosing “Show only outer pole labels“ in “Mobile display mode for scaled questions with extended pole labels“, the answer options for scaled questions with extended pole labels can be displayed side by side in the mobile display. When choosing “Show all pole labels“ every answer option will be displayed with its pole labels and they will be displayed one below the other.

Scaled questions will be displayed as a slider when the option “**Display scaled questions as a slider**“ is activated. Please note the following restrictions: The slider does not have a neutral position, but a direct value of 1 when the survey is opened. It is not one hundred percent responsive and not barrier-free. You can activate the option “**Use larger controls**“ to display single choice, multiple choice and scaled questions with larger controls, which makes selection easier.

In the section “**Image for Image Scale**“ an image can be uploaded which is used as an alternative to the standard scale display. Please note: When creating a scaled question in the VividForms Editor, the option "Display this scaled question as an image scale in online surveys" must be activated.

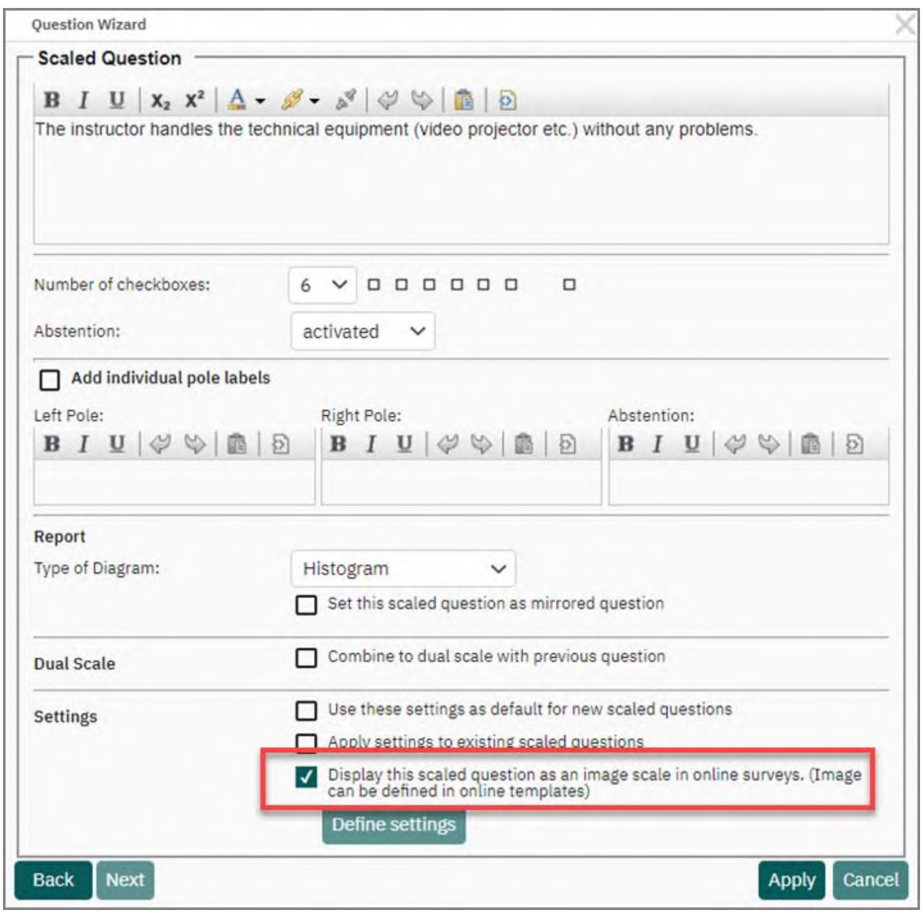


Figure 179: Image Scale in the Question Wizard

The image which you want to use as a scale image must be in png or jpg format and have a size of 16x32px. We recommend the use of a transparent png file in order to obtain an optimal display format. The upper half of the icon is displayed in non-selected form; the lower half in selected form.

Figure 180: Example of Images in png Format (16x32)

The following image shows an example of questions which are displayed with a scale image:

Figure 181: Image Scale in the Online Survey

- **Display of dual scale questions**

  Dual scale questions can appear side by side or one below the other in an online survey

- **Exclusive answer option for multiple choice questions**

  This function allows for definition of one or more exclusive answer options. Example: A question contains five answer options, the last of which is “None of the above“. If participants select this answer option, all other check marks, if any, will automatically be disabled.

  The exclusive answer option must be entered in the text box. It is also possible to use this function for multiple answer options. In this case, the individual selection values must be separated by a pipe character.

  Please note that the spelling of the answer option on the questionnaire must be identical.

- **Accessibility**

  In this section it is possible to make settings for the contrast mode, which makes it easier for visually impaired people to complete the survey thanks to a strong black-and-white contrast. The contrast mode switch is activated by default. It can be turned off if necessary.

Whilst customizing the template, you can change between the different tabs at any time. Once you have completed your editing, click on the button [Accept]. The template just created now appears in the overview:

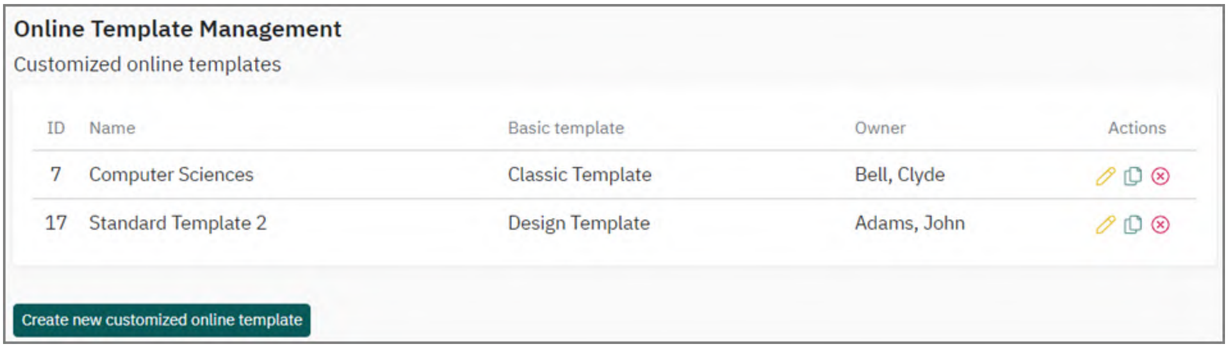


Figure 182: Customized Online Template - Overview

With a click on the pencil icon, the template can be edited at any time, or deleted by clicking on the red cross-icon. Also, with the aid of the page icon a copy can be made. The copy now appears in the list as a new template and can be edited further.

Once you have created the template, link it, as described above, with the subunit or a specific survey in which it is to be used.

Using a Customized Online Template

In order to be able to use a customized online template in an online survey, it must be activated for use. This can be done on three levels:

- System-wide
- Per subunit
- Per survey

If you want to use an online template system-wide, it must be defined as a new standard in the evasys configuration. To do this, open the menu "System Settings / evasysSettings / Survey Online". Select the desired template from the drop-down menu and click [Save]. The selected template will then be used for all online surveys, unless a different template is defined in the subunit details or for a specific survey.

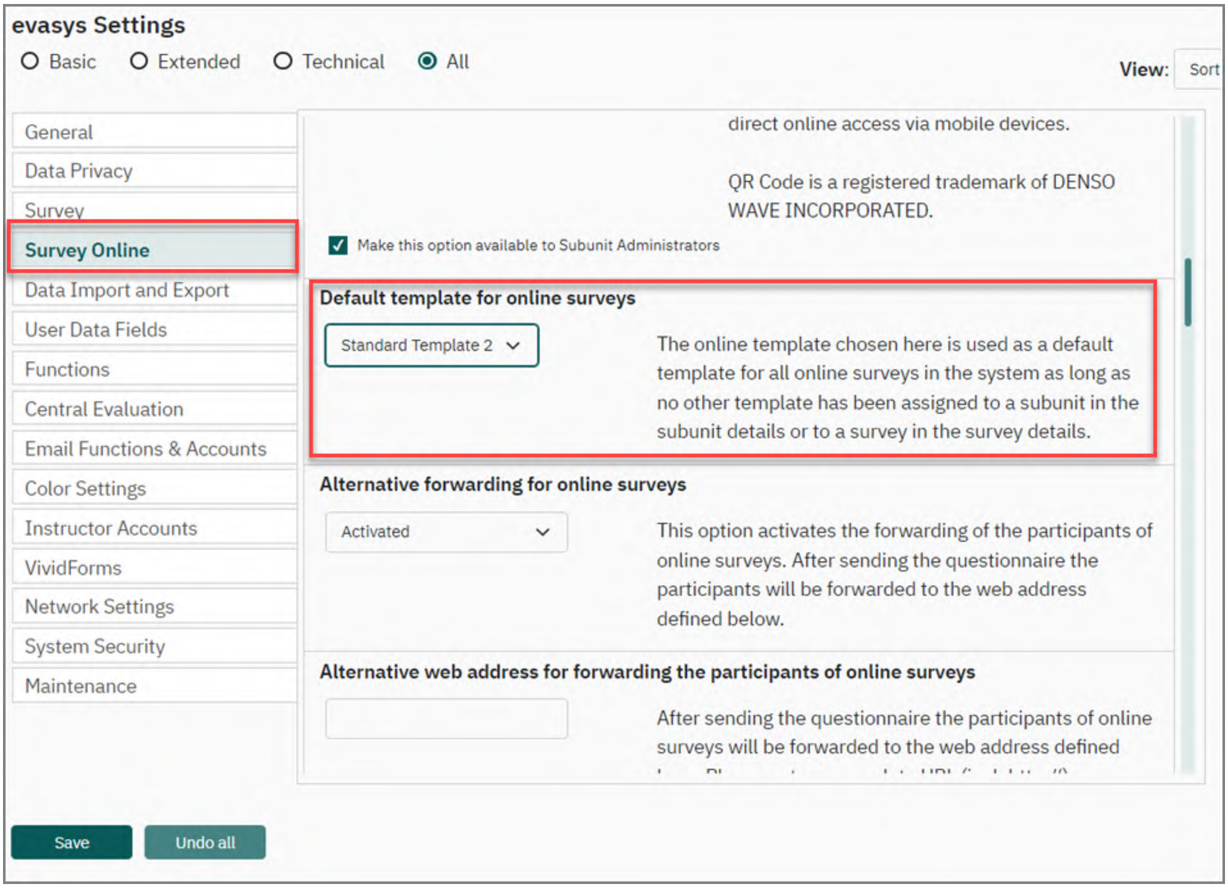


Figure 183: Set Online Template System-wide

If you want to use a template for online surveys of a specific subunit, please switch to the properties dialogue of a subunit. Here you can select one of the online templates available and thus individually define the layout of this subunit's online surveys. Select an option from the list next to “Online template”.

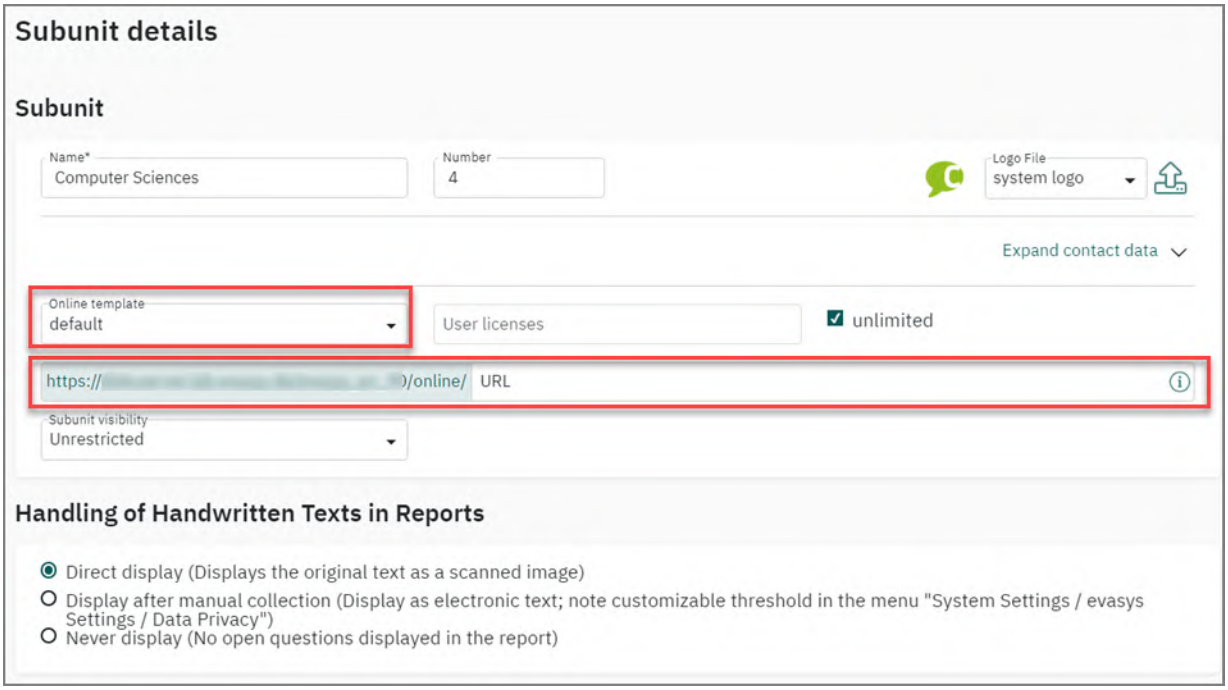


Figure 184: Linking the Online Template with a Subunit

As well as this, an individual suffix to the online survey web server address can be defined for the subunit (see chapter B 2.1.1. „Setting up the Subunits“). This is important so that the individually defined login image appears when you register for the online survey. If you leave out the individual suffix, the default login image appears.

To assign an online template to a single online survey, click the survey name to open the survey details. In the "Actions" section under "Online template" you can use the drop-down menu to select a template and use it for the survey by clicking [OK].

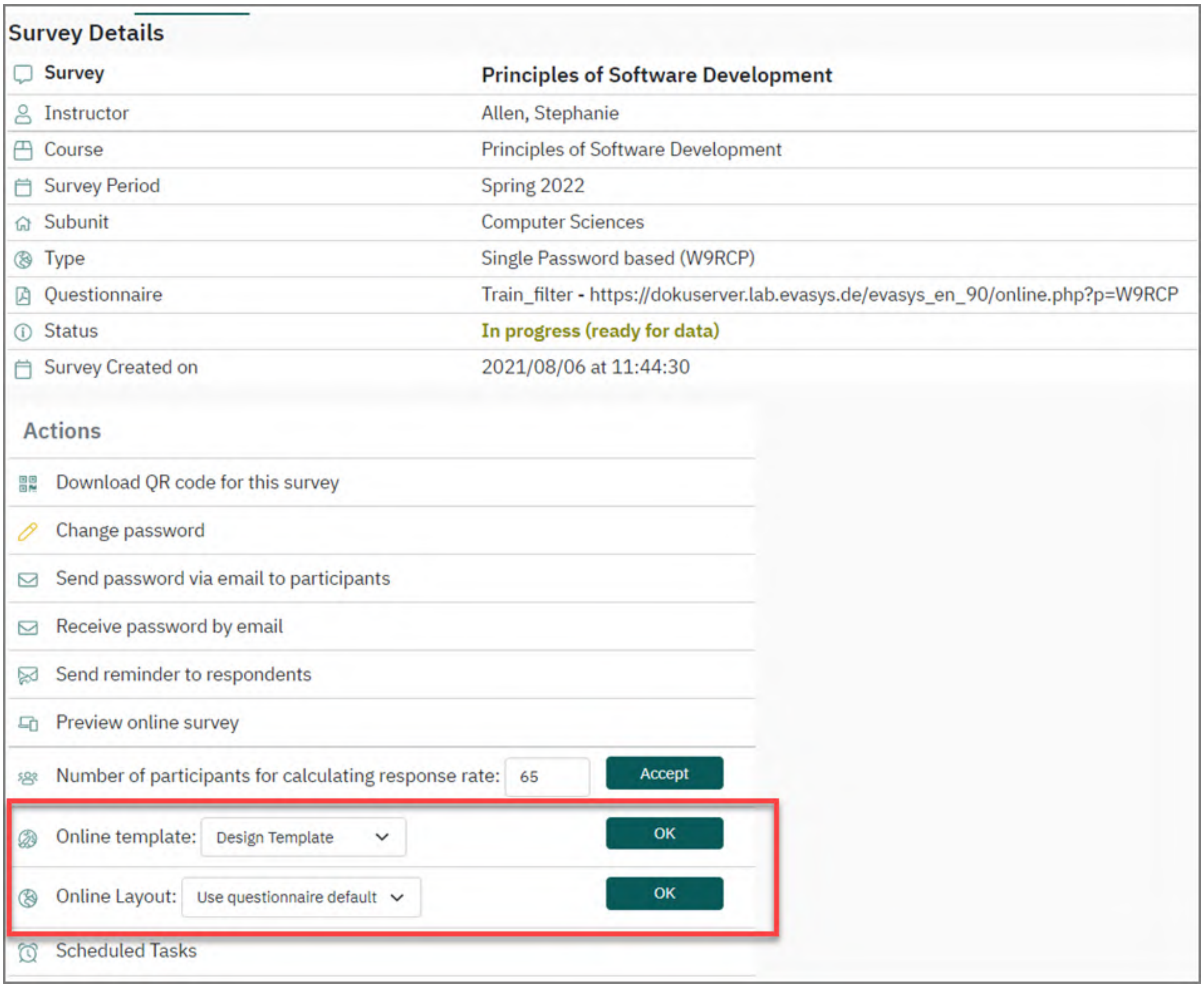


Figure 185: Assign Template to Online Survey

Access Rights to Online Templates for Subunit Administrators

As the administrator, you can define within the user properties of the subunit administrators whether a subunit administrator has the right to create or modify online templates. In the drop-down menu next to “Online templates” you can choose between following rights:

- Defined by administrator (No access)
- Templates only (meaning the subunit administrator cannot create his own templates)
- Unrestricted

This option of assigning rights can be seen in the following figure:

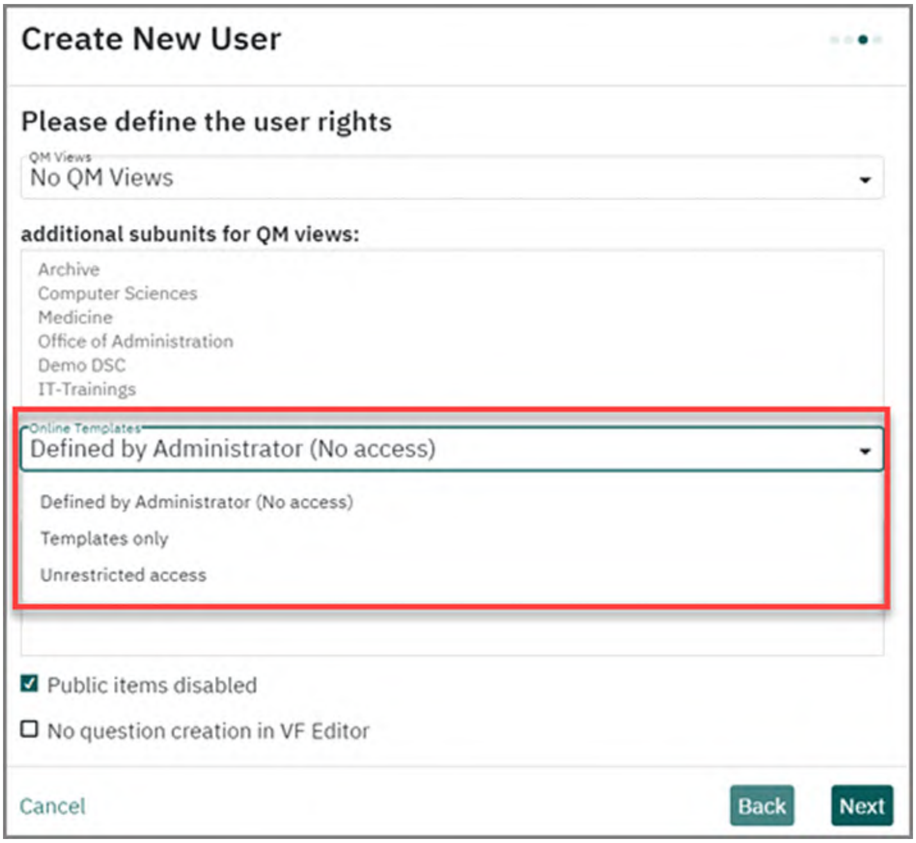


Figure 186: Creation of Templates by Subunit Administrators: Assignment of Rights

3.15.3. Create a barrier-free online survey

Web accessibility is also becoming increasingly important in the field of online surveys. By following international standards such as WCAG 2.1 (Web Content Accessibility Guidelines 2.1), the US Section 508 and the European standard EN 301 549 for the barrier-free design of internet-based offerings, people with disabilities should also be able to access the content of websites as easily as possible.

With evasys, online surveys can be designed which, from a technical point of view, meet the accessibility requirements of WCAG 2.1 Level AA. With evasys 8.1 you have two templates available that you can use for compliant surveys: The Design Template and the Classic Template.However, the creator of a questionnaire and online survey also has to consider some important aspects in order to ensure that all participants have access to the questionnaire as barrier-free as possible:

- **Colours and contrasts**
  - The online template should not be too colourful. Use few colours with high contrasts.
  - According to WCAG 2.1, the contrast ratio must be at least 4.5:1 for level AA and at least 7:1 for level AAA. To determine the contrast ratio, a tool such as the "Color Contrast Analyzer", which is available free of charge, can be used.

- Avoid colour combinations such as red on green or red on blue as well as pastel shades in combination with white; some people may find it difficult or impossible to distinguish them.

- **Graphics**
  - If you use graphics in the questionnaire that are not purely decorative but serve informative purposes, they must be provided with an alternative text.
  - Alternative texts can be stored when uploading an image into the image library and - if necessary - can be set or edited here later. Use the "Description" field in the image library wizard for this purpose.
  - The alternative text should not exceed 80 characters. Do not use introductions such as "The figure shows..."; graphics are already announced as such by the screen reader.
  - -Since version 8.0 it is possible for scaled questions to display an image scale (e.g. asterisks) in the online survey instead of the normal scale, with the help of which the participants can evaluate the quality of an aspect. For this purpose, the question is marked accordingly in the VividForms editor and the desired image is defined in the online template. The image scale offers participants of online surveys visual support when filling out the scale. Please note that only the default image stored in the system for the image scale is accessible. If you use your own images for the image scale, accessibility cannot be checked and therefore cannot be guaranteed.
- **Links and link texts**
  - If you use links - e.g. in the introductory texts of your survey - always use meaningful link texts. Tip: Imagine that you see this link text outside the context? The link target should always be clear even outside the context.
  - Do not use Internet addresses (URI, URL) as link texts.
- **Online display**
  - Do not activate the print preview.
  - Do not use ranking questions, as they are not presented in an accessible way.
  - If you use your own customized online template: Do not use the "slider option" for scaled questions and do not use the "progress bar option".
  - Do not use simple pole texts for scaled questions, but always use them in combination with extended pole texts. In this way, the screen reader adopts the individual option texts of the extended pole text.
  - Repeat the extended pole texts before each column of scaled questions.
  - If you use extended pole texts, activate the option to activate contrast mode in your customized online template.
  - If you use an online template that we have customized as part of a customizing request, it is not automatically compatible with WCAG 2.1 Level AA because it uses its own internal structures.
- **Filter guide**
  - If filter rules are used in online surveys, it should be ensured that the questions that are displayed by a filter are not placed directly after the filter question, but

  rather on a new page.
  - If this is not possible, make sure that the answers to the filter question are not selectable via a drop-down list, but via checkboxes. Otherwise it may happen that the displayed question is skipped when using the keyboard.
- **Language**
  - If possible, questionnaires should be created in the standard language of the evasys system, since screen readers use the respective language defined in the source code as the basis for the pronunciation (e.g. German or English).
  - If a questionnaire has been translated into other languages in the questionnaire details ("Advanced settings/Languages"), the corresponding language abbreviation should be stored for the respective languages. This is used by screen readers as a basis for the pronunciation.
- **Sensory information**
  - Avoid information that relates solely to the visually visible position, e.g. left, right, top or bottom. Always link such descriptions to another characteristic, for example, one that appears in the text.
  - Also avoid information that refers to color alone.
- **Font (the following first two bullet points are not required for WCAG 2.1 compliance, but recommended)**
  - Use sans serif fonts (not Times New Roman).
  - Do not use italics (difficult to read) and underlines (can be confused with links).
  - Set free text left-aligned, this makes it easier to read for users of magnification systems (Level AAA).
- **CAPTCHAs**
  - Do not use CAPTCHAs if you provide questionnaires.
- **Comprehensibility (required for conformance level AAA, but also recommended for level A and AA)**
  - Do not use abbreviations, e.g. for abstention (no n.a.), write out the texts.
  - Formulate positively and actively.
  - Avoid foreign words and use uniform terminology.
  - When using double scale questions: Formulate the questions in such a way that the aspects of assessment and importance emerge from the question texts and not only from the pole texts (e.g. "How helpful was the teaching material?" very helpful - not very helpful/ "How important is helpful teaching material?" very important - not very important). Be consistent in the formulation of these questions.

When opening an online survey, evasys checks whether the questionnaire and template meet the basic accessibility requirements. If this is the case, a conformance logo is displayed in the footer of the online survey. Clicking on the logo opens a declaration of conformity in a new window, which identifies the online survey as WCAG 2.1 AA compliant.

To assist you assess the accessibility of the online survey, you will find a voluntary self-declaration of conformity with WCAG Standard 2.1 in our VPAT® Declaration of Conformity. This voluntary self-disclosure is available for download in the evasys Extras.

If an online survey does not meet the criteria, the seal of approval is not displayed. If you want to find out why exactly the logo is not displayed, you can check this with the help of the JavaScript console of your browser. In Firefox you can open it with the following key combination: Ctrl+Shift+J. In Internet Explorer 11, open it by pressing "F12" and clicking on the "Console" tab in the window that opens.

If the logo is not visible, the reason should be displayed in the console. The following messages are possible:

Message	Meaning
wcag-logo disabled, as the printpreview is active but not compliant.	As soon as the print preview is activated for the questionnaire, the survey is no longer WCAG2.1 compliant, as this feature is very confusing in its current form. You can disable it in the questionnaire details.
wcag-logo disabled, as this survey is based on a designer form.	Questionnaires created with the VividForms designer are not WCAG2.1 compliant.
wcag-logo disabled, as scales are represented by sliders, which are not completely accessible.	Sliders can already be implemented in the context of modern screen readers. However, downward compatibility is still problematic. You can deactivate them in your online template settings.
wcag-logo disabled, as a progressbar is in use, which is not completely accessible.	The progress bar is not WCAG2.0 compliant. You can disable it in your online template settings.
wcag-logo disabled, as a non-system-template is used for rendering.	All templates based on individual adaptations of HTML, CSS and logic are generally not provided with the logo, as they would have to be tested for this. If you want to conduct an accessible survey, please use an online template that has been configured using the evasys functionality.
wcag-logo disabled, as the form is using plausibilty-checks, which is not proofed to be completely accessible.	If you use plausibility checks in your form, the logo will also be hidden, as these are not fully implemented in a barrier-free manner. If necessary, waive plausibility checks.
wcag-logo disabled, as mobiledevice-layouts are not completely accessible.	As soon as the system has recognized that it is being displayed on a mobile device, it is generally assumed that the display is not barrier-free. This is done for safety reasons, as it is not possible to predict on which of the many different platforms problems will occur.
wcag-logo disabled, as there are some scaled questions, that do not have matching extended pole-element above to take optiontexts from.	If scaled questions have individual pole texts and/or no extended pole texts have been defined to provide a unique identifier for each scale option, there is no automatic assurance that WCAG2.0 requirements are met. To avoid problems at this point, you should follow the creation instructions earlier in this chapter.
wcag-logo disabled, as a ranking question exists	The ranking question is not WCAG 2.1 compliant.
wcag-logo disabled, as scaled questions, single-choice- and/or multiple-choice-questions are displayed using images in order to have bigger input-elements.	If the option "Large control elements" is activated in the online template used, then these are not WCAG2.0-compliant because they are implemented with the help of images. If necessary, deactivate the option in your online template.
wcag-logo disabled, as custom rating image is set, which are not proofed to be completely accessible	As soon as the system has detected that own images are used for the image scales in scale questions, it is basically assumed that the representation is not accessible. This is done for safety, as it is not possible to check whether the images are WCAG 2.1 compliant.

Table 8: Accessibility messages

Information about used symbols in online surveys with design template about the status

The status of individual pages of an online survey ("fully completed", "partially completed" and "not yet completed") is communicated in the design template via several channels:

- Visually via a catchy and easy-to-learn color scheme.
- Through text overlays for conveying a respective status to blind participants of an online survey
- And optionally by activating a contrast switch, which has a strong contrast and can be controlled with the mouse as well as with the keyboard. It can be easily turned on and off by users without causing page reloads or other glitches. The used markers form a progress bar for a given page

The multiple status markers follow the following scheme:

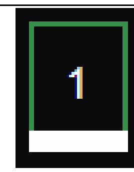
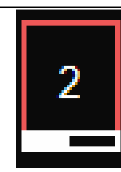
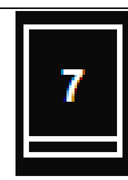
Status	Color information	Screen reader text background and announcement	Display in contrast mode
Completely answered	Green underscore	Completely answered	
Partial answered	Red underscore	Partial answered	
Actual Tab – not answered	Tab number in bold font, subscript of a yellow underline, 1px border	Actual Tab – not answered	
Not answered	Light grey underscore	Not answered	

Table 9: Status markers

3.15.4. Multiple Languages

For online surveys, you can assign several languages to one form in evasys. By this means evasys allows you to create forms, conduct surveys and present results in reports in a number of languages.

A questionnaire already integrated into evasys can be adapted to a new language any time you like. The language of the first version is automatically defined as the main language.

To define a language select the option “Languages” from the drop-down list in the “Details” view of a questionnaire.

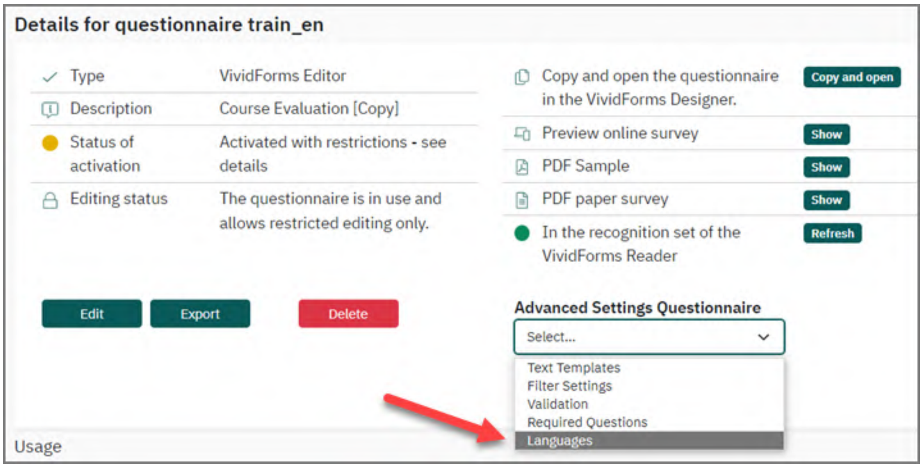


Figure 187: Questionnaire Details: Add Languages to a Questionnaire

For the main language and any subsequent language you can make the following settings:

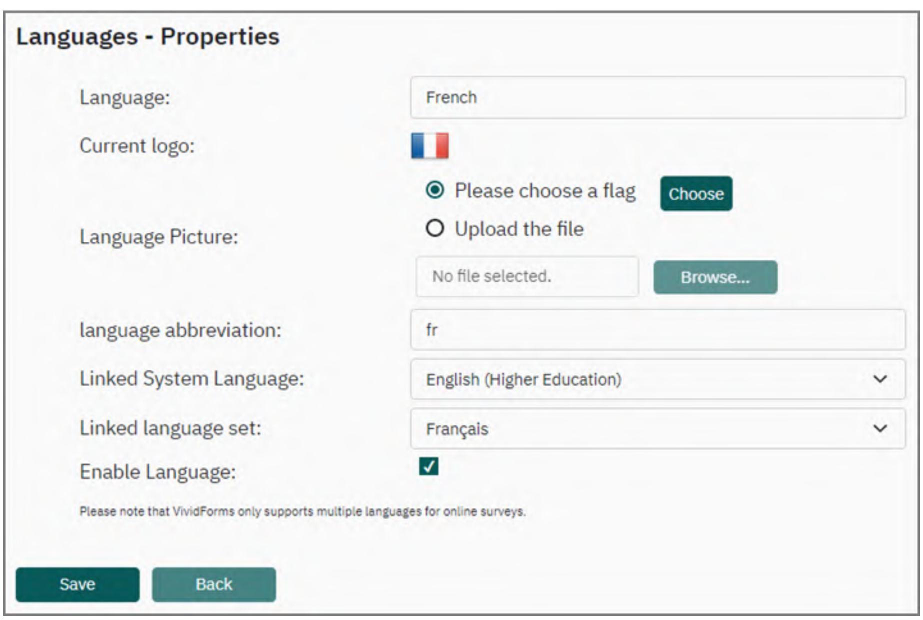


Figure 188: Language: Define Settings

- Name of the language

  Enter the name of the language.

Attention:
The arabic language setting is predefined. Please name the language itself only „Arabic“ or „arabic“.

- **Language picture**

  Here you can specify the logo of a language set, that can be used for switching the language in online surveys. You should choose the size of the logo in such a way, that the display is fitting (i.e. for flags, 40x27 pixels).

  Either click on [Upload the file] and then on [Browse] and choose a graphic file. The file formats JPG, GIF and PNG are supported.

  Or you use the logos supplied. Here, evasys offers you the country flags of the world to choose from. Click on [Please choose a flag] and then on the button [Choose]. In the window that then opens, you can choose the flag that fits the language.

- **Language abbreviation**

  The language abbreviation saved here is used by screen readers as basis for the pronunciation of a text. Therefore the matching HTML language abbreviation should be saved for the respective language (e.g. de for German, en for English).

- **Linked system language**

  The language set selected here is used for the system dialogue for online surveys. Language sets are defined in “System Settings/evasys Settings/Language sets”.

- **Use**

  Activate/Deactivate the language.

Then click [Save] to save the main language. You can add a new language with the button [Add language]. First enter, as described above, the details of the language, and save these entries. Afterwards you can translate your questionnaire.

Translate Questionnaire

After a click on [Save] you will see the complete contents of the questionnaire, i.e. question groups, question texts, pole labels and answer options.

On top of the entry boxes the texts of the main language are displayed; in the text boxes you can now enter the translations (see picture above).

The translations are saved automatically by evasys. Under the button [Save] at the end of the page you can see at any time, when your translation was last automatically saved by evasys.

Figure 189: Languages: Defining Texts

You can also make changes in language texts and in the language attributes at a later point in time by selecting a language in the drop-down “Current Language”, editing the text and then saving the changes.

Language Options in Online Surveys

You can display a questionnaire's translated languages in the HTML online survey. The questionnaire always appears in the main language after authentification through the PSWD procedure. Beneath the header data you will see the logos that have been defined as questionnaire languages. By clicking the logo you change languages. There is also a drop-down menu with the name of each language.

After clicking the logo or selecting the language in the drop-down menu, the survey is displayed in the desired language. A further authentication is not necessary.

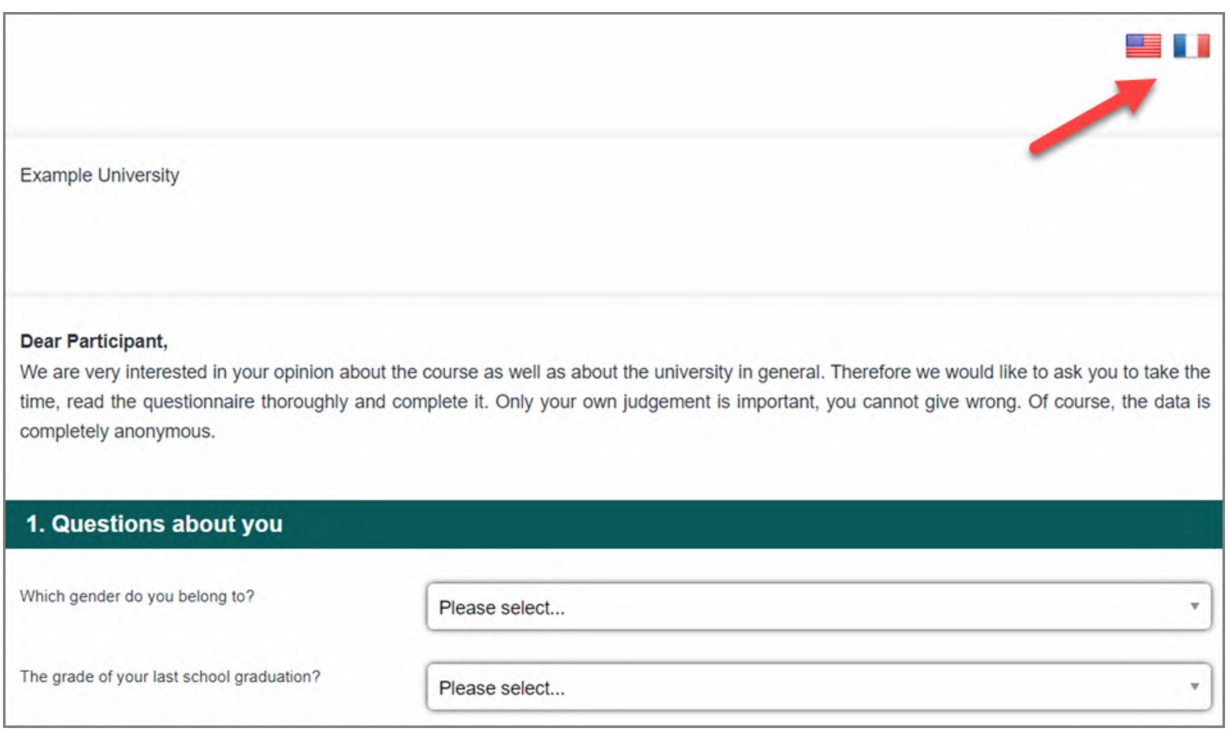


Figure 190: Languages: Selection in Online Survey

If additional languages for system messages are to be made available to online survey participants, you can integrate them in evasys. For online surveys, this refers to short messages such as [Continue], [Send] and [Save temporarily], but also to longer texts such as “The red marked multiple choice questions have more options selected than allowed. Please reduce the number of selected options accordingly.”. (Please note: here we are talking about elements that do not directly originate from the questionnaire, because you can directly translate all elements of a questionnaire. To do this, select the option “Languages” in the respective questionnaire’s details).

The internationalization of online surveys is achieved by language sets. Because, for online surveys, particularly those with an international approach, many more languages need to be translated than is possible with linked system languages, the language sets enable internationalization beyond integrated system languages.

The expedient use of language sets requires two steps:

- Step 1: General definition of a language set

  Via the language sets you can define text elements for online surveys and thus include them in your evasys system.

- Step 2: Linking a language set with a questionnaire

  If you wish to use a particular questionnaire for online surveys and additional languages are relevant, specify the relevant language sets for this particular questionnaire. Of course you can link a language set with any number of questionnaires.

Step 1: General Definition of a Language Set

You will find the language sets in the sub-menu of the main menu “System Settings” (on the left-hand side). After clicking on the menu point “Language sets”, a list appears with the language sets that are already in place. If you haven’t yet added any language sets, they will correspond with the system languages available:

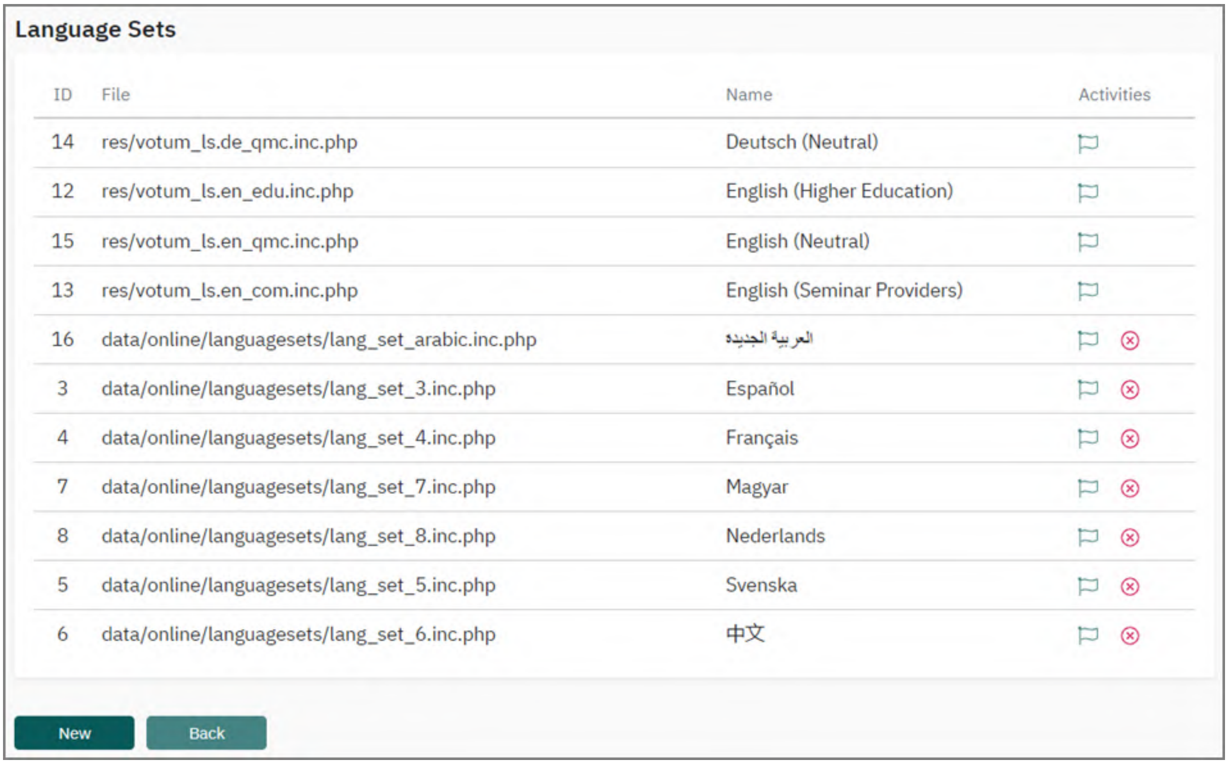


Figure 191: Overview of the Language Sets

To view an existing language set, click in the column “Activities” in the line of the respective language set on “View”. An overview of the language messages with the current translation will be displayed. In the following example you can see the translation from the system language English into Spanish:

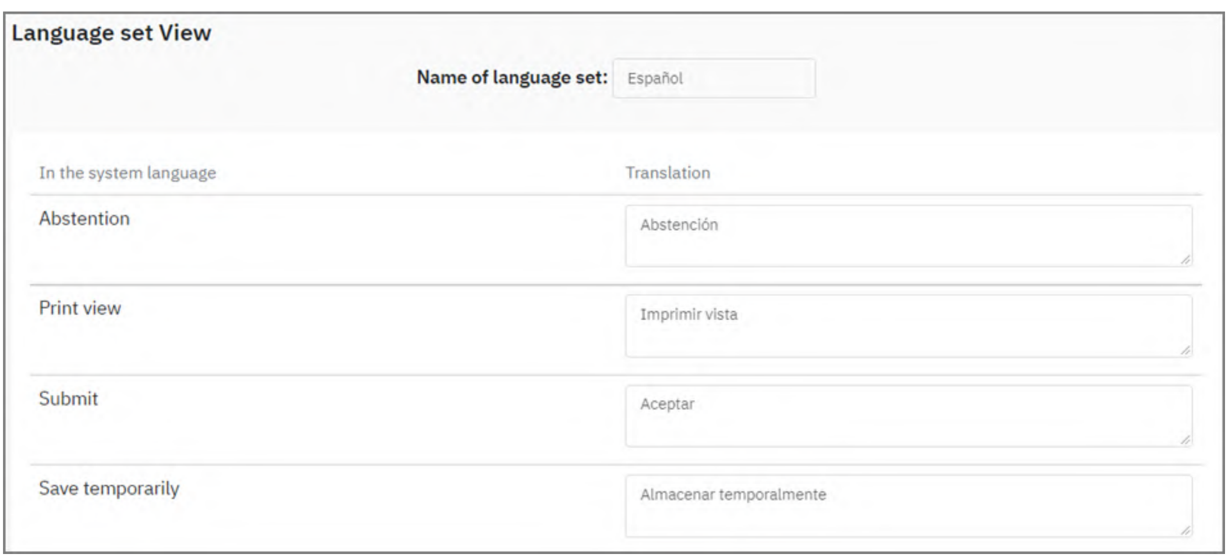


Figure 192: Language Set (here: Spanish) in Detail

The listing contains the text elements that appear in online surveys, along with their respective translations.

Click on the bottom of the screen on [Back] to return to the start menu.

To create a new language set, click on [New] below the list of existing language sets. Name the language set and then translate all elements:

Figure 193: Defining a Language Set

Note:
The language set can only be saved when all elements have been translated!

Once saved, the language set appears in the list of existing language sets. Unlike language sets linked with system languages, here you have the possibility of editing or deleting the language set. This option is also recognized by the additional buttons in the list.

Step 2: Linking a Language Set with a Questionnaire

In order to use a language set for online surveys, you have to link it with the questionnaire with which you conduct the respective online survey. This is possible in a questionnaire's details. The details of a questionnaire are available in the menu "Questionnaires/Questionnaire List". Click on the name of a questionnaire in the list; you will be directed to the details of the questionnaire. In the drop-down-menu in the area "Advanced settings" select the option "Languages" and click on [Edit].

If you have not yet defined a language, you first have to define the questionnaire's standard language:

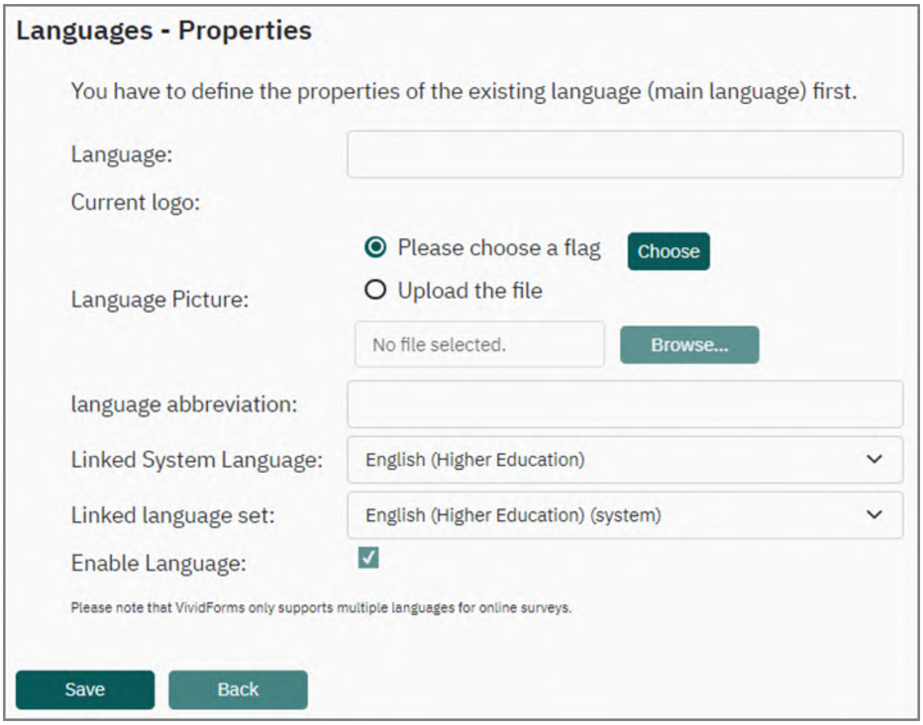


Figure 194: Defining the Questionnaire's Main Language

The above figure shows that the language set "English" is linked with the system language "English" (here the main language).

After defining the main language you can add a further language:

Figure 195: Adding a Further Language

As you do with the main language, you define their properties and can link your language set with the questionnaire here. For example, it makes sense to use the language set "Français" for the questionnaire's French translation:

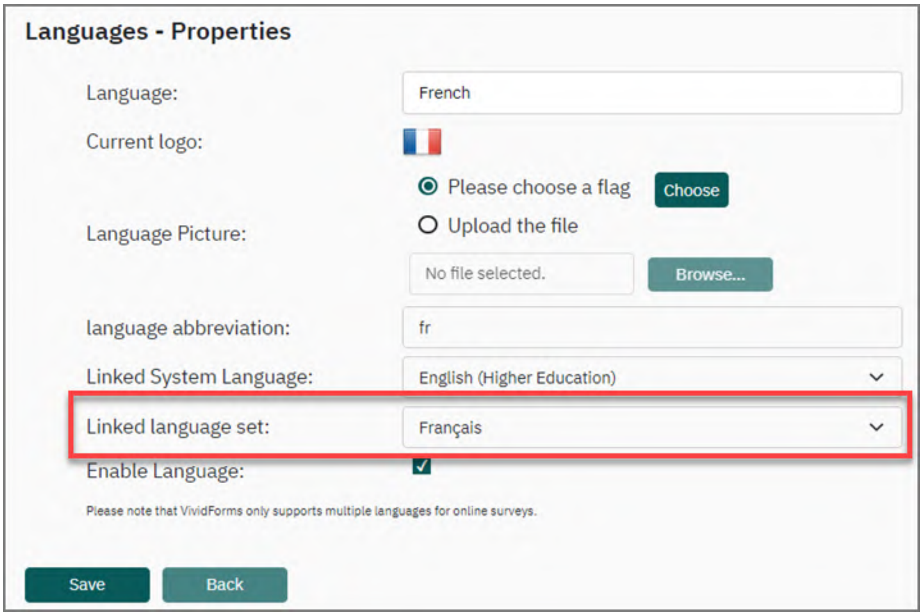


Figure 196: Linking the Language Set with the Translated Questionnaire

Note:
The definition of language sets applies to the system messages, not to the questionnaire. You have to translate the questionnaire additionally.

3.15.5. Special Case: Arabic Language

In evasys you have the possibility to generate Arabic surveys as well. In principle, you can use any existing questionnaire in your system for generating surveys in Arabic, by using it with the appropriate language set and translate them. See also chapter B 3.15.4. "Multiple Languages"

When creating an Arabic survey only, we recommend to create a paper-based survey in a rtl-language (english/german etc.) and later translate the survey to arabic, since the editor does not support a mirrored design for paper based or online surveys, while editing. The online survey itself will of course be mirrored, when generated.

Figure 197: Online Survey Arabic

To display the PDF-Report for an Arabic Survey in a correct way, we recommend that you get a copy of the desired PDF report and enable the mirroring of the layout in the configuration.

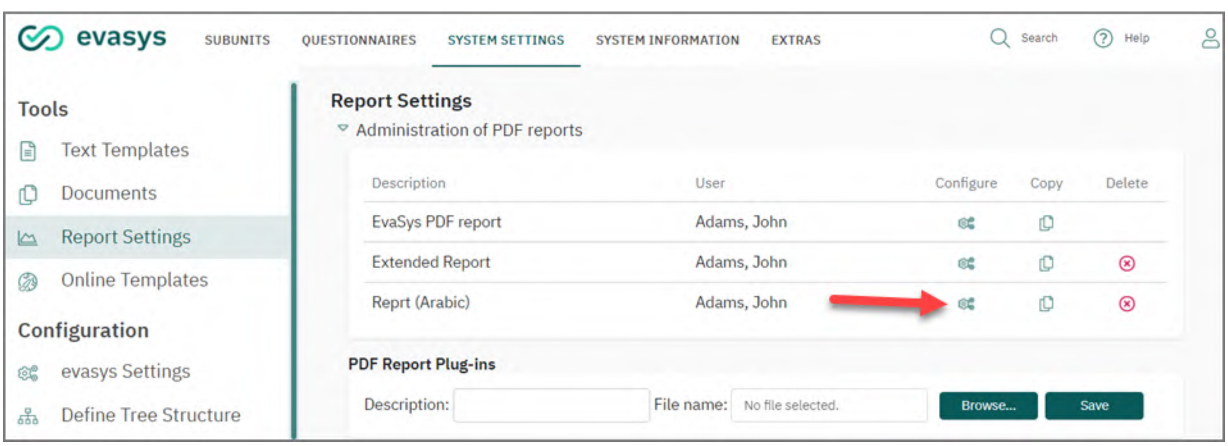


Figure 198: Opening the report settings

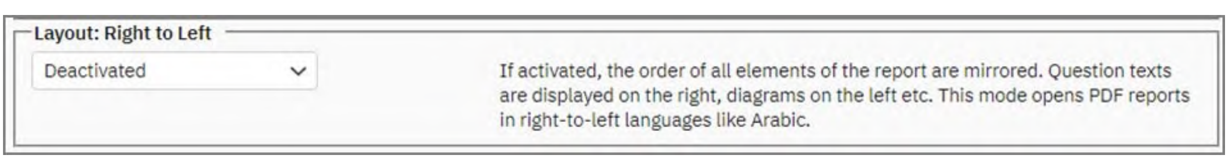


Figure 199: Layout: right to left

All components of the report are mirrored:

- Cover letter to the instructor

- Report header
- Statistical values
- Indicators, incl. Cronbach‘s Alpha
- Single question analysis
- Profile Line
- Presentation template
- Answers to open questions
- Question numbering and numbers in Arabic-Indian script
- Survey notes

The following components are currently not supported:

- Large histograms
- Report for the dean
- Norming and detailed norming report
- QM report
- Report creator: Display of report sources and filters

If the report is to be displayed completely in Arabic, then the following settings must be considered:

- An Arabic form of address has to be defined for the instructors
- The evaluation period must be Arabic
- The text templates and the questionnaire have to be Arabic
- The report has to be set to Layout: Right to left

The report can then be opened in the survey details after you have selected the corresponding language:

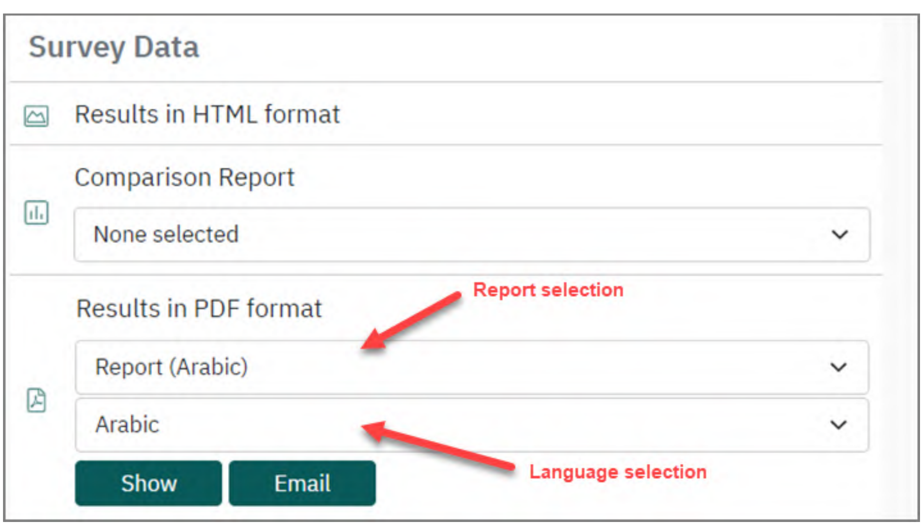


Figure 200: Open Arabic PDF Report

If everything has been set correctly, the layout is completely mirrored.

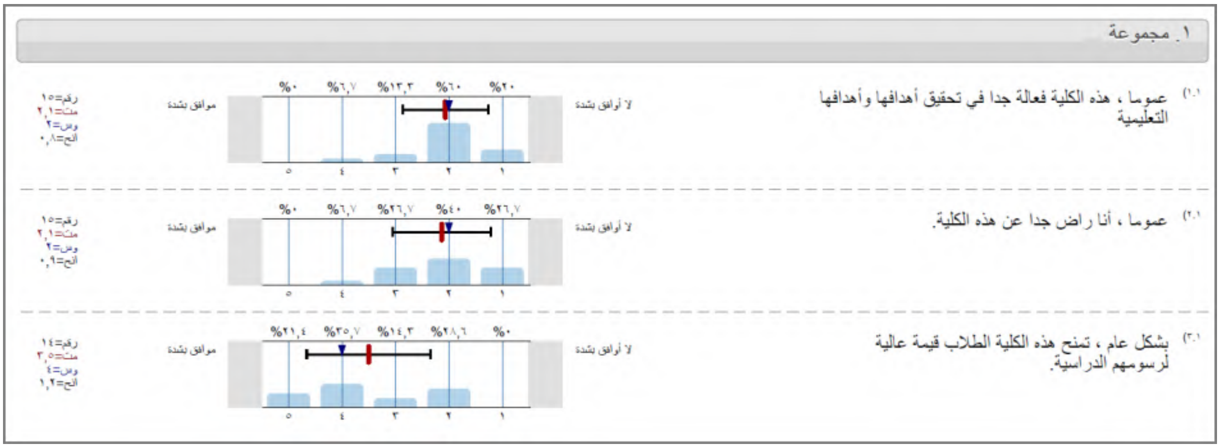


Figure 201: Arabic PDF Report

3.15.6. Application of QR Codes

To enable online survey respondents with mobile devices convenient access to an online survey, QR codes which include both the information of the URL to the online survey and to the PSWD or password, can be used. Once the QR code has been scanned, the participant is taken directly to the online questionnaire. A mobile device or smartphone with a camera resolution of at least 3 mega pixel is needed to correctly recognize the QR code.

Three possibilities are available for the use of QR codes:

- PSWD-based online surveys: The QR code can be displayed on the PSWD cards.
- Single Password online surveys: The QR code can be found in the survey details as a graphic.
- Hybrid Surveys: The QR code can be displayed in the header of the survey and/or displayed on the PSWD cards

The URL contained in the QR code is based upon the URL set in the configuration under “System Settings/evasys Settings/Survey Online/Server Address for Direct Online Survey Access”. This may not exceed 80 characters in length.

In order to show the QR Code on the PSWD cards for PSWD-BASEDPSWD-based surveys, the corresponding card format must be set in the system configuration. To do this, select in the menu “System Settings/evasys Settings/Survey Online/Format PSWD Document” the option 5 (= 3x8 PSWDs per page (A4) with QR Code) or 6 (3x6 PSWDs per page (Letter) with QR Code). The PSWD cards will now show the QR codes.

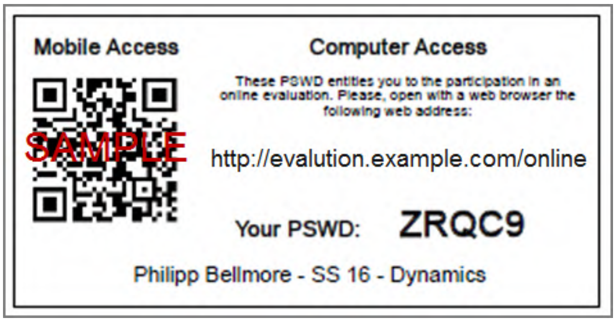


Figure 202: QR Code: Display on PSWD Cards

In the case of single password online surveys, the QR code can be downloaded as a graphic file in the details of a survey. Click the option “Download QR Code for this survey”. The QR code will be downloaded as a PNG file and can be used for posters, announcements etc.

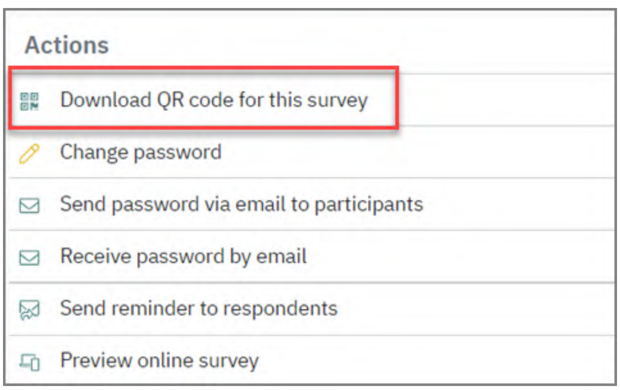


Figure 203: QR Code: Download for Password Based Surveys

In hybrid surveys, the QR code can be printed on the paper questionnaire, allowing the participants to retrieve the online survey form as an alternative to paper. This setting must already be made when creating the questionnaire in VividForms Editor. To do so, click in the Edit view of the VividForms editor on the logo in the header section of the questionnaire. Then in the logo wizard, select the option “QR code for hybrid surveys”. The preview now shows an example QR code. After generating the hybrid survey an individual sheet with QR codes can be generated for each participant (To create hybrid surveys see chapter B 3.7. "Hybrid Surveys").

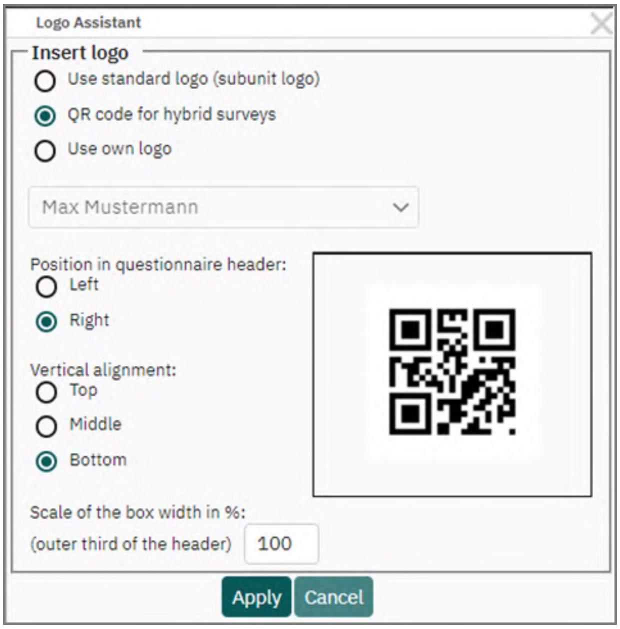


Figure 204: QR Code: Display in Questionnaire Header for Hybrid Surveys

Note:
Only use questionnaires with QR Codes for hybrid surveys. If necessary, create a copy of the questionnaire if you would like to use it for hard copy surveys.

3.15.7. Participation Tracking

Participation tracking enables you to create a CSV file where all of the used and non-utilized PSWDs of your online surveys are listed.

In online surveys whose PSWDs have been sent by email to the respondents, the participation tracking allows for easier identification of those participants who haven't taken part in a survey. Whilst preserving the anonymity of survey participants who have already completed their questionnaire, participants who, in spite of their invitation, have not yet used their PSWD, can be identified by their email address. In the menu "System Settings/evasys Settings/Survey Online/Participation tracking (online surveys): Protection of anonymity" you can define the minimum return. The minimal return defined here must be reached, in order for specific survey information on participation and non-participation to be released.

To access participation tracking, click in the menu "Subunits/Central Evaluation/Participation Tracking". A window opens automatically in which you can select any number of subunits, survey periods, course types, questionnaires and courses. Subsequently, click on [Request] to trigger the participation tracking. A "Save as…" dialog appears. Select a folder and click on [Save]. Then, open the saved CSV file to call up the information on participation and non-participation. Not only 14-digit PSWDs are displayed, but also 5-digit PSWDs, so that you can compare them better with any PSWDs retrieved via CSV:

	A	B	C	D	E
1	Survey	PSWD (14-digit)	PSWD (5-digit)	Email	Participated
2	Photoshop for Beginners	N566HT08HAI579	1C5CD	p1@example.com	Yes
3	Photoshop for Beginners	P70MZ7JNYNX902	3SCRQ	p2@example.com	No
4	Photoshop for Beginners	Q82BP7KRDJU7A6	4HCVM	p3@example.com	Yes
5	Photoshop for Beginners	Q82MAPC9LY6692	4SUD8	p4@example.com	No
6	Photoshop for Beginners	S179G8EDIU55CA	6FDH4	p5@example.com	No
7	Photoshop for Beginners	V43FPSBQYNU92D	9LXUQ	p6@example.com	Yes
8	Photoshop for Beginners	33DENS7W0GM6AE	AK47J	p7@example.com	No
9	Photoshop for Beginners	55HP7P68HRZ746	C21CU	p8@example.com	Yes
10	Photoshop for Beginners	55HHSUEVEBJ7E1	CNZZE	p9@example.com	No
11	Photoshop for Beginners	88NHVKXFRDO8B0	FNPJG	p10@example.com	No
12	Photoshop for Beginners	99PHWMAHUS1786	GNRL2	p11@example.com	Yes

Figure 205: Example CSV File of Participation Tracking

As soon as you call up the participation tracking for online surveys for which you distributed PSWD cards instead of sending the PSWDs per email, the email column remains empty.

If the function is not required, it can be deactivated under “System Settings/evasys Settings/Functions/Display Participation Tracking”.

3.15.8. Access Data of Temporarily Saved Questionnaires

You can specify in a survey's settings whether the participants of a PSWD-based online survey should be given the possibility to store the questionnaire temporarily and fill it out again at a later point in time (compare chapter B 2.3.2. “Questionnaire administration”). If the participant stores the questionnaire temporarily and does not fill out the survey to completion or send it, then by default the data is not taken on in the evaluation.

If desired, the temporarily stored data can be made accessible for the purpose of further evaluation (e.g. to analyze the point of termination). For this, activate the option “Data export: Include temporarily saved data” at “System Settings/evasys Settings/Data Privacy” in the central system configuration. This setting may only be made by the Administrator and is valid for surveys with all questionnaires for which the temporary storage function is active.

Figure 206: Access temporarily stored data

If the option is active, a message is shown to the online survey participant when temporarily storing the survey, stating that the data is being saved for further processing. At this point, the participant has the option to cancel saving.

The temporarily stored data is neither integrated in the PDF reports nor the raw data that can be retrieved by default. However, it can be explicitly retrieved via the menu "Subunits/Data Export" if the corresponding selection box is active ("Include temporarily saved results from online surveys").

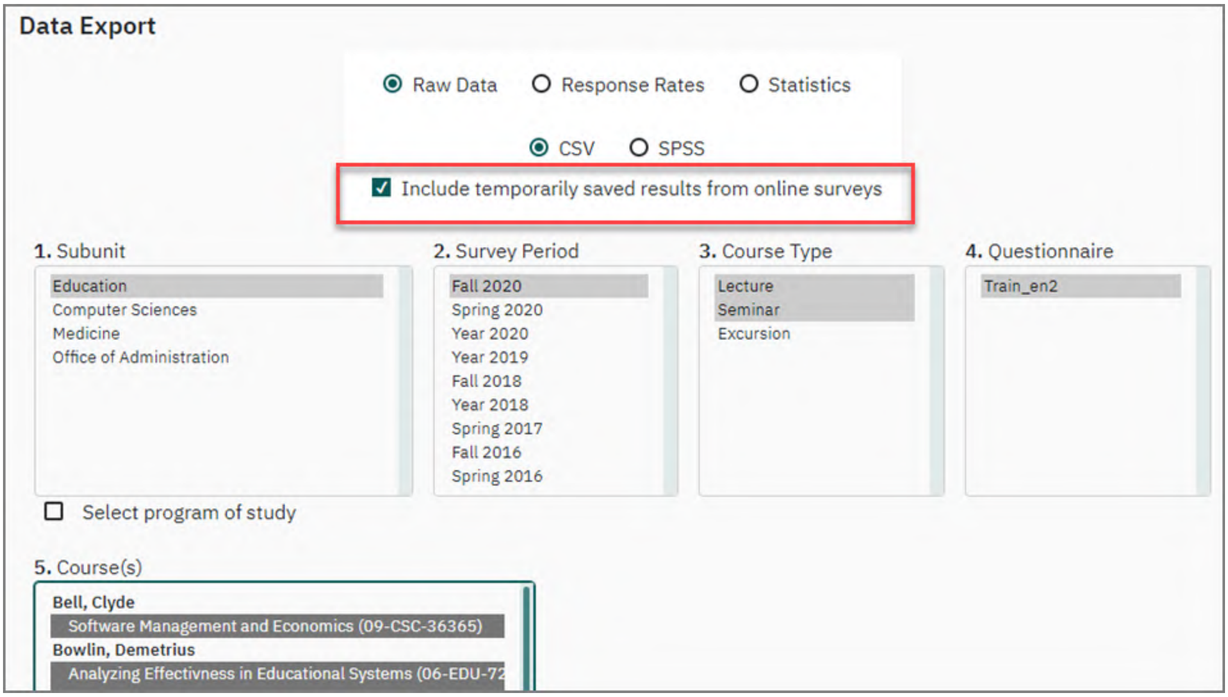


Figure 207: Data export: Retrieving temporarily stored results

The temporarily stored data sets are identified in the CSV or SPSS file by the message "Temporarily saved results" in the time stamp column.

3.15.9. Methods of Treating Empty Questionnaire Returns

If a completely empty questionnaire is sent off by a participant, this is counted by default as a return, and enters the calculation of the response rate for the survey. If this is not desired, activate the option "Delete blank questionnaires" at "System Settings/evasys Settings/Functions/General" in the system configuration. An empty return does not then increase the return number but is deleted directly. In the case of questionnaires with multiple choice questions, you can specify separately when a multiple choice question is deemed as unanswered, and thus the return as empty. For further information, see the notes on the configuration options in chapter D 2.5.7. "Functions".

Note:
This function affects empty returns from paper and online surveys. Consider carefully in advance if you would like to activate it.

3.15.10. Viewing the Results for Survey Participants

In comparison to paper surveys, implementing comprehensive online surveys offers some organizational advantages. But the often lower number of returns poses a significant disadvantage which can only be partly compensated for through motivational measures aimed at the survey participants.

Along with the participants' obligation – possibly entailing queries regarding the regulatory framework or the quality of resulting data – quite often rewarding motivational procedures are also followed. These, in turn, entail organizational effort.

evasys, therefore, offers the alternative of survey participants accessing the survey results. Of course, access is granted only to those survey participants who have in fact participated in the survey.

Access to survey results is enabled in the questionnaire details, so access is individually controlled per questionnaire. You will find the area “Evaluation for participants” in the field “Usage” (details of a questionnaire).

There you can authorize the viewing of results. As, in this case, only access to results of closed questions is authorized, the option “Display responses to open questions” can be additionally selected.

If you authorize the viewing of results, the online survey participants have access to the HTML report as soon as the survey has been closed. Each participant can use his PSWD to again log on to the same page on which the questionnaire was previously available. Instead of the questionnaire now the HTML report is accessible.

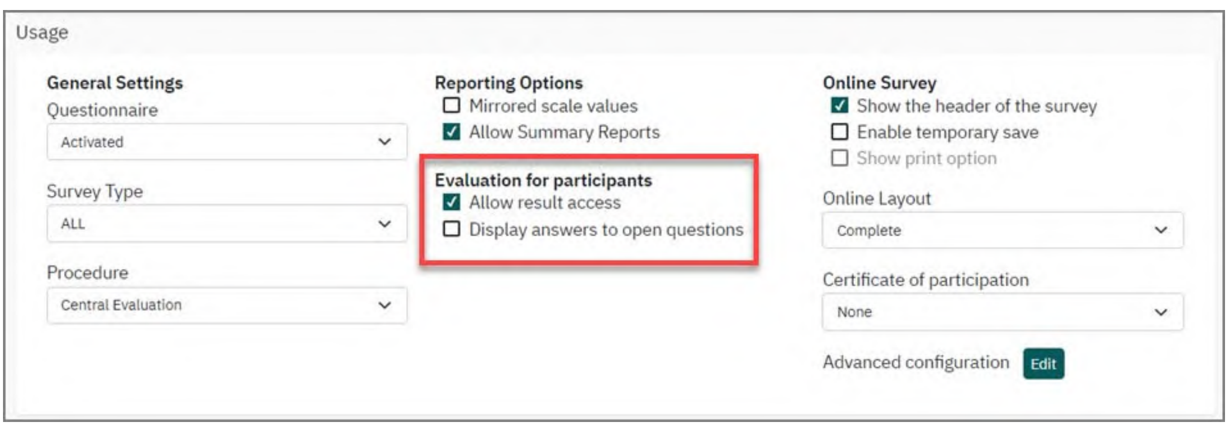


Figure 208: Result for Online Survey Participant: Authorization in the Questionnaire

Important: Only those participants who were logged-in during the survey can now log in again to download the report. The system verifies that the PSWD has already been used for this. This ensures that nobody can log-on who has received a PSWD but has not yet participated in the survey.

Please note: If you do module surveys and if there are different participant groups for different module parts, the participants will be shown the report for the complete module and not only for the module parts s/he is assigned to.

If desired, the result access can also be controlled for each survey in the survey details. In the Actions area, the pre-setting of the questionnaire can be overwritten using the option "View results for participants", i.e. access to the HTML report can be released or blocked manually. In this way, for example, only time-limited access to the evaluation can be made possible.

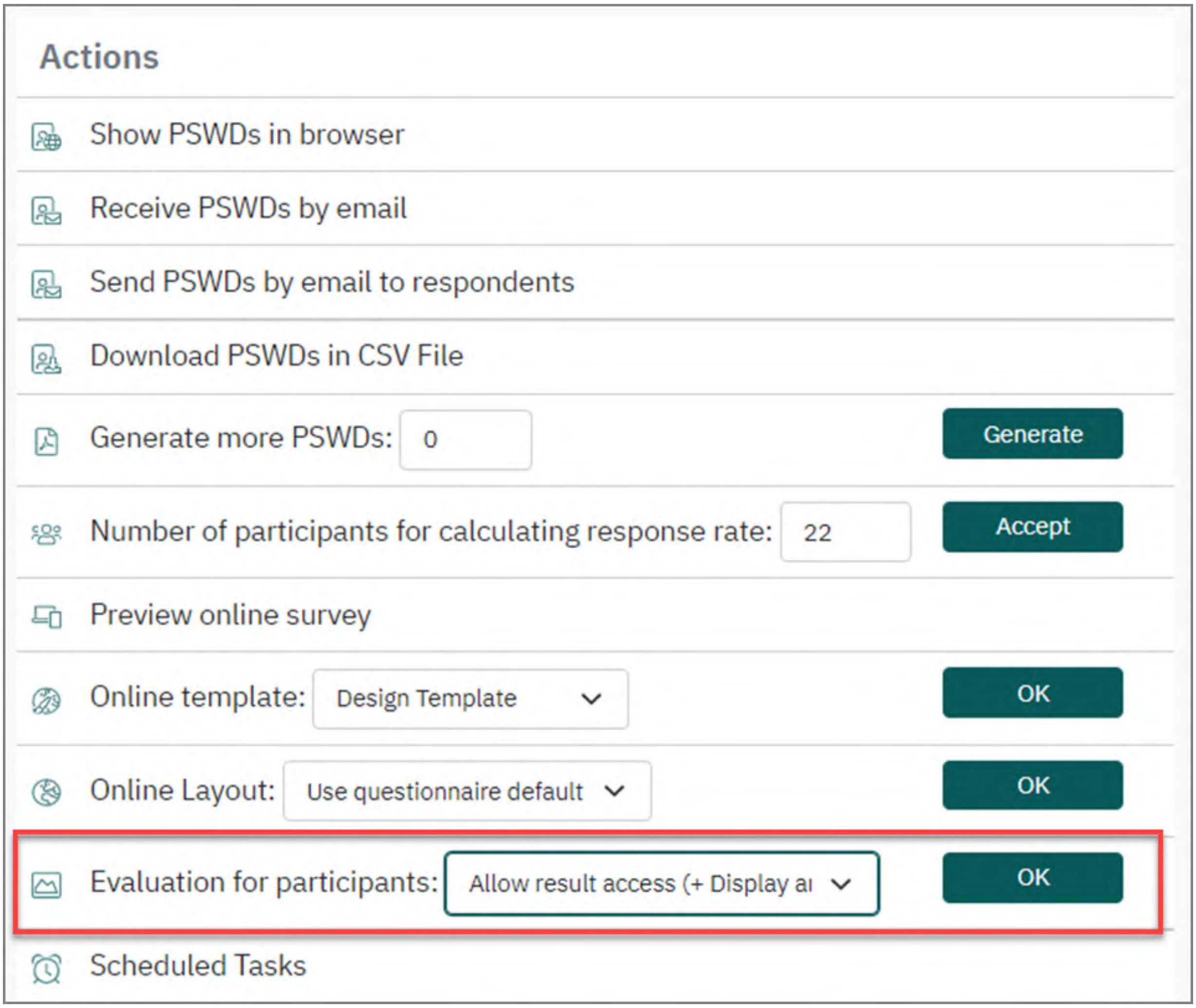


Figure 209: Define result access in the survey details

The information on the accessibility of results can be communicated to the participants via email once the survey has been closed. It is, however, not a condition for accessing the results using the PSWD. The email on the report accessibility will be sent out either manually or by using the time control of online surveys.

If you wish to send out the information manually, click in the details of a survey on “Send result access information to participants”:

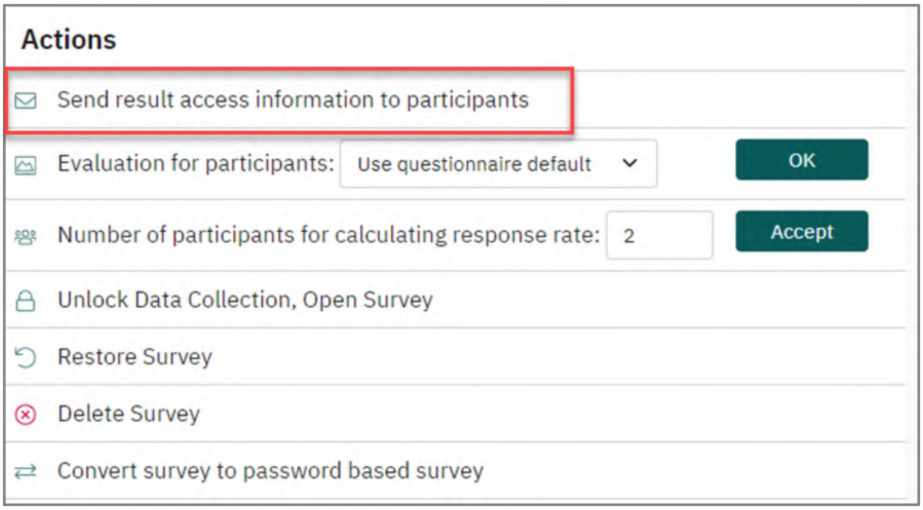


Figure 210: Manually send an Email on the Accessibility of the Report

Upon confirmation of the recipient list the email is sent. Please note that this function is only available after an online survey has been closed.

The automated dispatch of the access information is accomplished through the time control. The time control can be reached either through the survey details (provided that the survey is still running) or via the check mark box “User Time control” straight after the generation of online surveys:

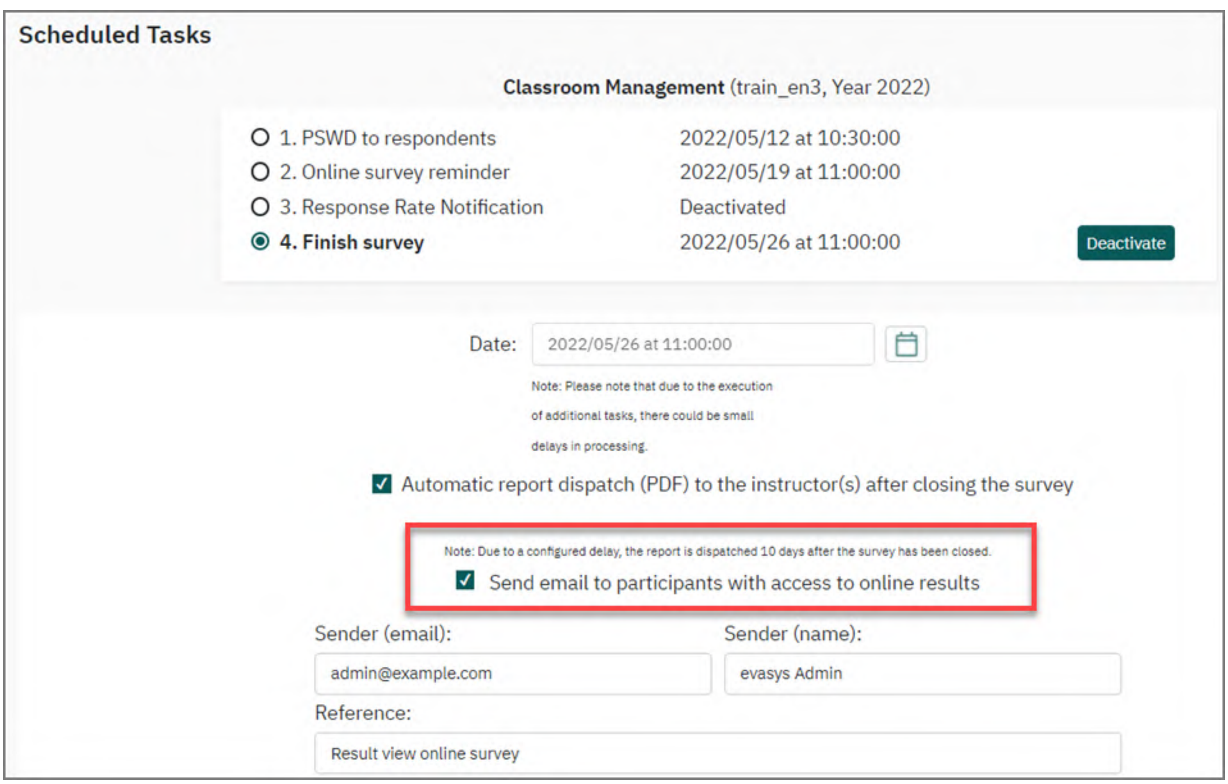


Figure 211: Dispatch Email to Participants via Time-controlled Online Surveys

After activating the procedure “Close survey” the option “Send result access information to participants” appears. This way the dispatch of accessibility details is directly linked with the automated closure of the particular survey. Upon entering their PSWD, the authorized survey participants receive access to the HTML report:

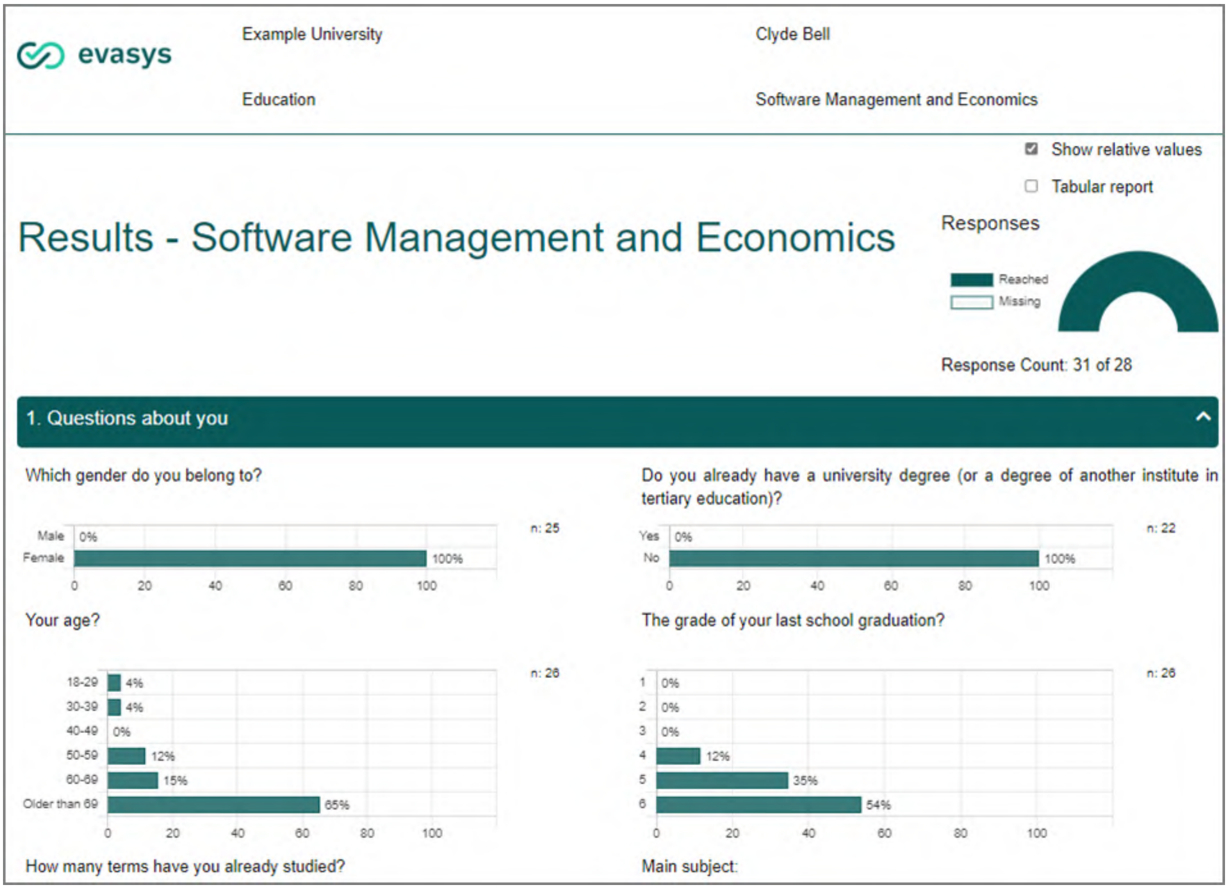


Abbildung 212: HTML Report

The text templates (main menu “System Settings”/sub-menu on the left-hand side “Text Templates”) contains the text “E-mail: Information about result access to participants”. Here the standard text that is sent to the participants of a survey can be deposited as soon as the survey has been closed:

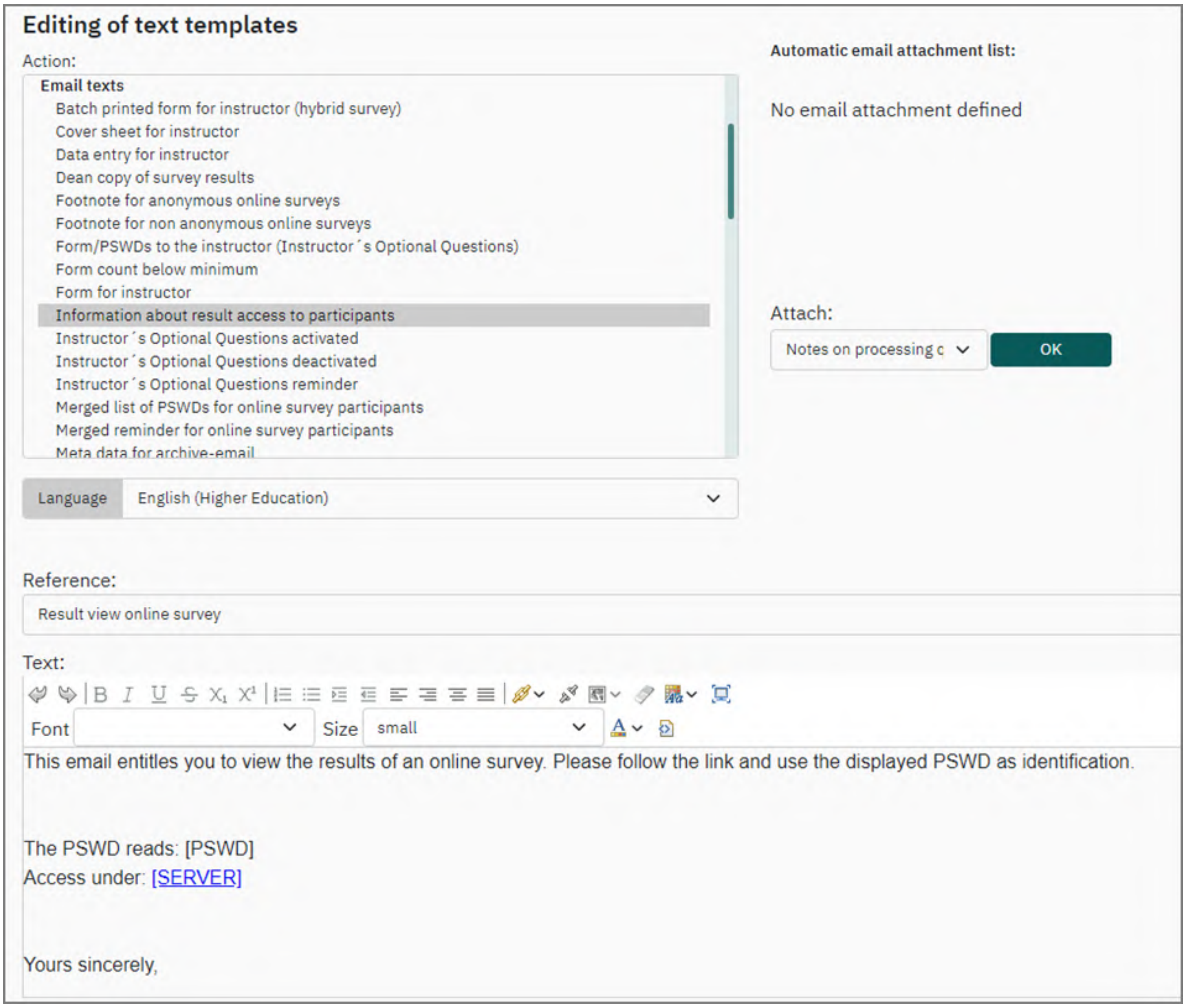


Figure 213: Editing the Email Text on Information for Online Survey Participants

3.15.11. Merge scheduled Emails

You can activate consolidation of time controlled emails in the menu “System Settings/evasys Settings/Survey Online” This function is particularly helpful if you intend to send many surveys automatically at the same time. It allows you to merge your emails automatically and relieves the pressure on your email service.

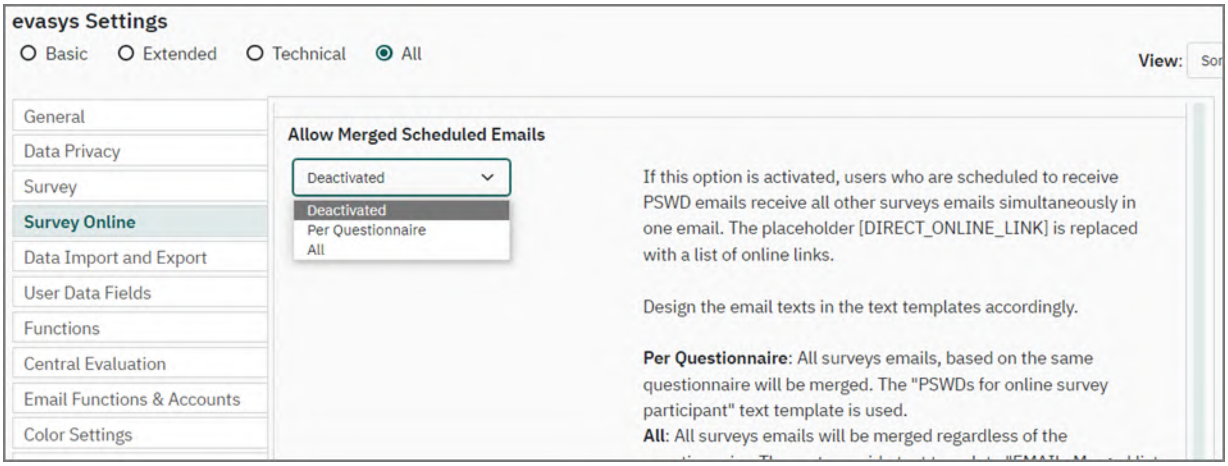


Figure 214: Allow merging of time-scheduled emails

If you have used scheduled tasks to automatically send invitation/reminder emails to participants of a PSWD-based or a single password online survey, before sending the message, the system will check if there is another message to be sent to the same participant at the same time. If there are other surveys with identical questionnaires to be sent to the same email address, the messages will be merged before being sent to the participant.

The configuration enables two different sending options: When the option “Per Questionnaire“ is selected, only emails for surveys based on the same questionnaires are summarized. When the option “All“ is selected, emails for surveys based on different questionnaires are also summarized. If the switch has been changed, it may take a few minutes before the change is processed. For this reason, a little time should elapse between the changeover of the switch and the actual dispatch. Alternatively, the memcached server must be restarted on the server.

Option 1: Summarizing emails for surveys with the same questionnaire

If you would like to use this function, first adjust the individual text templates in the questionnaire details or the standard text templates in the menu “System Settings/ Text Templates” (see chapter D 2.1. „Text Templates“). The email texts: “PSWDs for online survey participants”, “Remind online survey participant” and the footnotes for anonymous or non-anonymous online questionnaires should be adjusted.

Emails to an online survey participant can only be consolidated automatically if, with reference to several surveys with identical questionnaires, the surveys are either all anonymous or all non-anonymous.

Option 2: Summarizing emails for surveys with different questionnaires

Select this option especially when you are carrying out module surveys and would like the links to several surveys to be summarized in an email.

Separate text templates are available in this case for sending PSWDs and reminders that are used instead of text templates for simple sending:

- Merged list of PSWDs for online survey participants
- Merged reminder for online survey participants

Both text templates are only available as cross-system text templates at “System Settings/Text Templates”, and thus can only be edited by the administrator or the secondary administrator.

General Notes

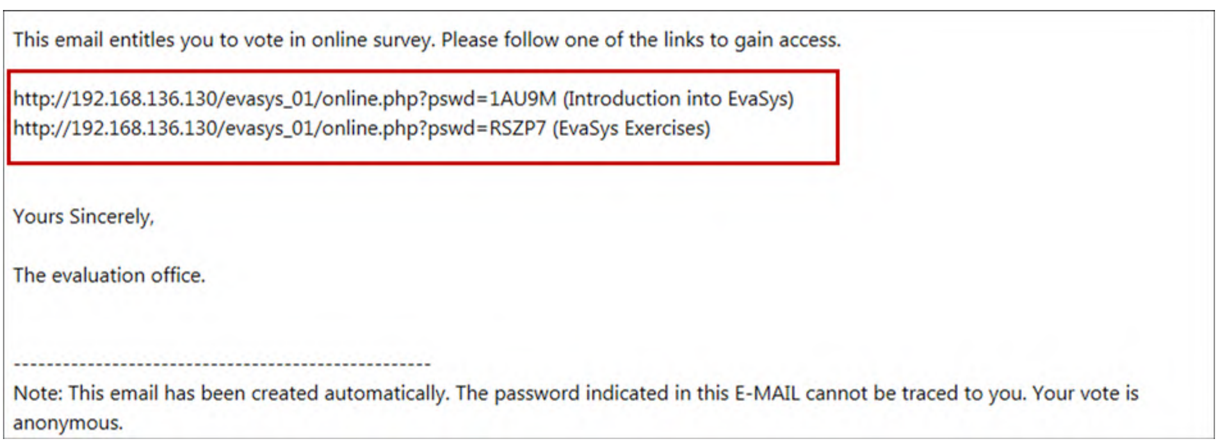
To consolidate several surveys into one email you will require the placeholder [DIRECT_ONLINE_LINK]. When you merge the emails, the placeholder will be replaced by links to the surveys followed by the name of the course in brackets.

The placeholders for surveys, for example [SURVEY] are not needed in this instance, and will be automatically removed as the emails are merged.

Please ensure that you insert the [DIRECT_ONLINE_LINK] placeholder into the text of the message; inserting it as a HTML link could cause problems.

You can find a summary and description of all placeholders in chapter D “If a participation certificate for participation in online surveys is activated in the questionnaire details in form of a PDF document, this text is used for the document.”.

The following image shows a consolidated message including several surveys for an online survey participant:


This email entitles you to vote in online survey. Please follow one of the links to gain access.

http://192.168.136.130/evasys_01/online.php?pswd=1AU9M (Introduction into EvaSys)
http://192.168.136.130/evasys_01/online.php?pswd=RSZP7 (EvaSys Exercises)

Yours Sincerely,

The evaluation office.

Note: This email has been created automatically. The password indicated in this E-MAIL cannot be traced to you. Your vote is anonymous.

Figure 215: Merged Scheduled Emails

It is clear from this image that the message contained in the text templates for these emails may need to be less specific, as the message sent could apply to either one specific or several different surveys.

In the event that your mail server is experiencing a lag, meaning that consolidated emails within your outbox cannot be sent, then these emails will automatically be sent individually as per the standard procedure once an hour has passed. This ensures that old emails are not forgotten by the consolidation process.

If you create several PSWD-based surveys at the same time using the menu “Subunit/ Central Evaluation/Generate Survey,” you will receive an automatic message informing you that scheduled emails will be consolidated. Individual changes to text templates within "Scheduled Tasks" are lost in the email consolidation process; only standard text templates are sent in this case.

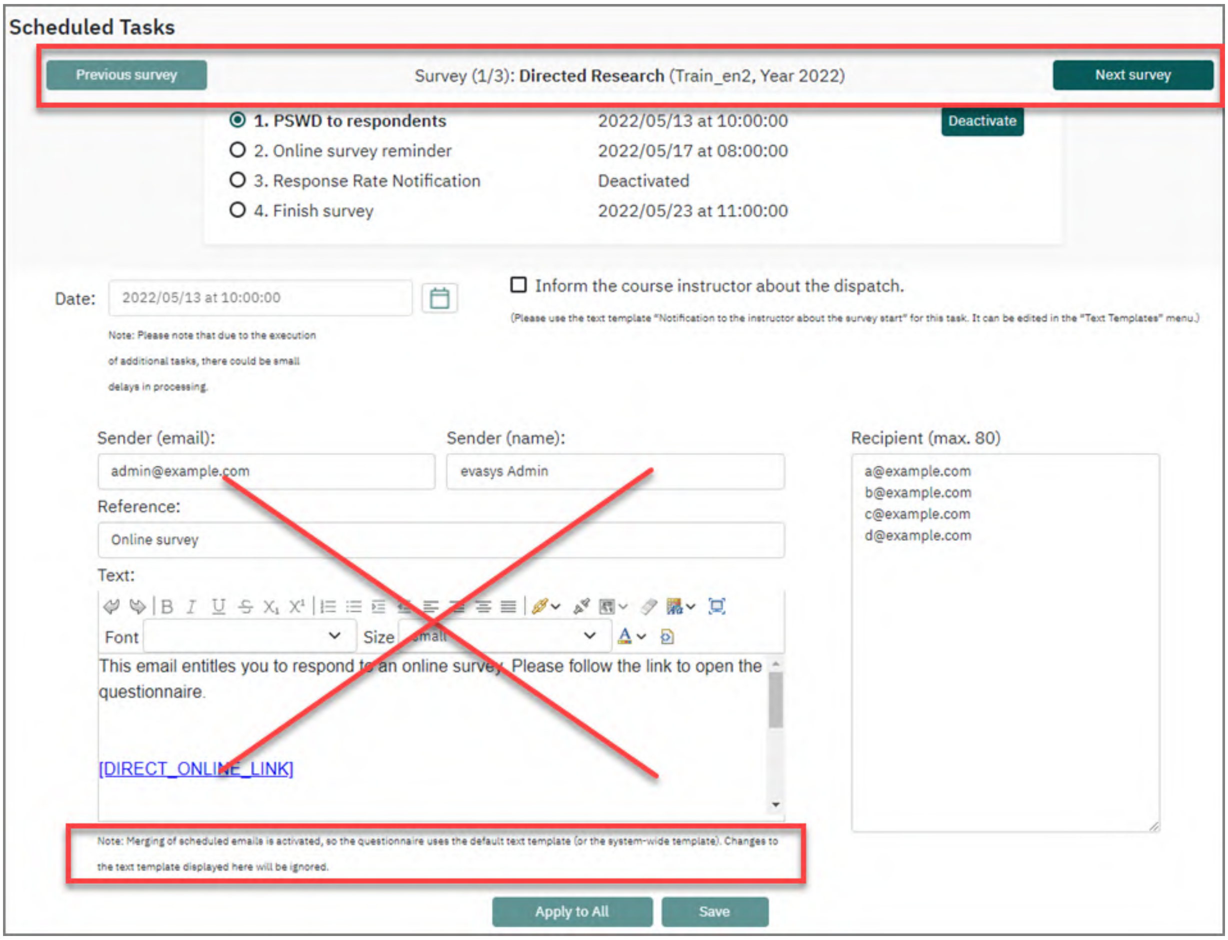


Figure 216: Scheduled Tasks - Merged Scheduled Emails

Note:
During automatic consolidation of time-controlled emails, the system always uses the individual text template on the questionnaire, if you select option 1. If there is no individual text template defined for the questionnaire, the system will use the standard text template in its place. It is not possible to change individual text templates within the scheduled tasks.
If you select option 2, the system-wide text templates will be used for summarized emails. In this case it is also not possible to adapt the text templates in the scheduled tasks.

3.16. Display Surveys

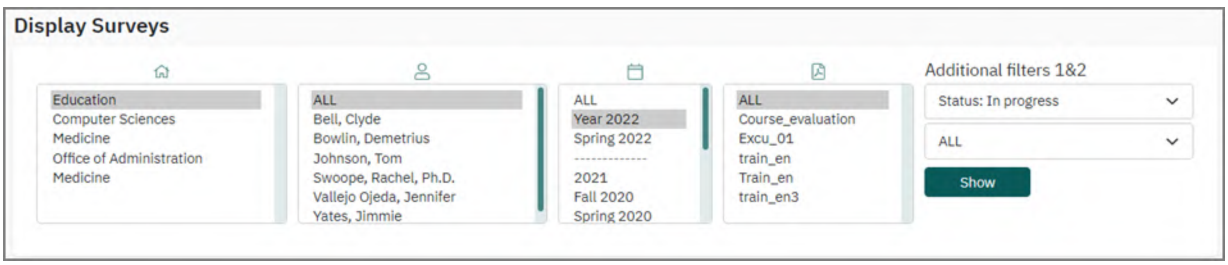


Figure 217: Display Surveys

In order to display a number of surveys, select in the box “Central Evaluation” the option “Display Surveys”. Then select one or more subunits, survey periods, the instructors and the relevant questionnaires and click on [Show].

Via the additional filter, the selection can, if desired, be refined according to differing survey status and types. In the drop-down lists, the following status and types are available:

- Status: ready, data available, data deleted, quantity of data too low, data capturing, verification, open, closed
- Type: online surveys, hard copy procedure, cover sheet procedure, merge, report (filtering), report (unweighted), hybrid (online and paper based), dynamic subgroups
- Status: PSWDs, reminder, questionnaire, evaluation submitted/not submitted

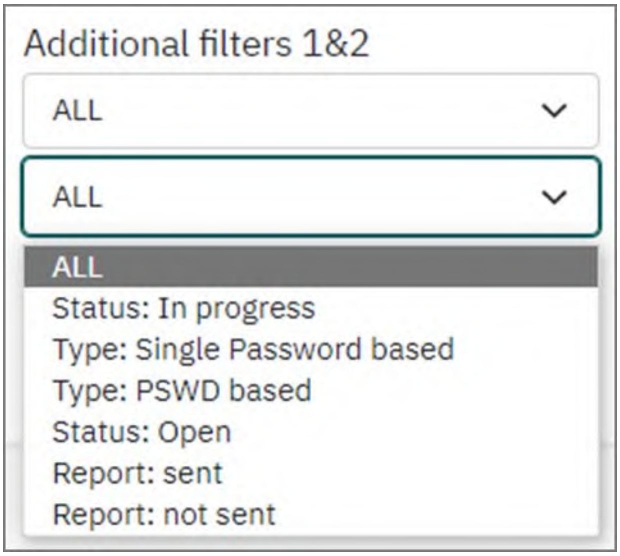


Figure 218: Additional Filters in the Survey Display

After clicking on [Show], the surveys are displayed in an overview according to the choices made.

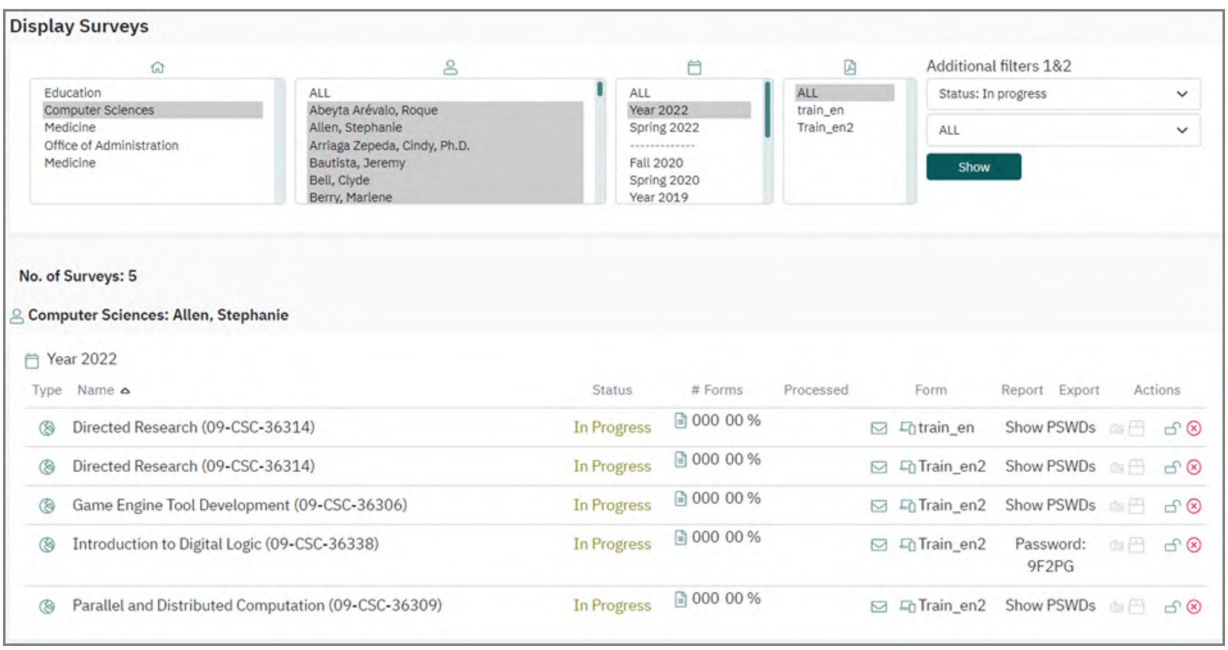


Figure 219: Display the Selected Surveys

Alternatively, the survey list of an instructor can be opened directly via the content view of a subunit. In this overview, a column with the heading “Surveys” is displayed. This includes two numbers for each instructor, separated by a forward slash, e.g. [1/3]. This corresponds to: [number of surveys processed/number of surveys created].

Figure 220: Accessing surveys within a Subunit

The display [0/2] means that the user has created two surveys in his user profile, for non of which returns have been received. With a mouse click on the number in brakkets you can access the survey results.

In the survey window you will see in a table the surveys you selected according to the filter above: depending on the status of the survey you can now initiate a number of different operations.

All available actions and information about the survey can be found in the survey details, which can be reached by clicking on the survey name.

With a click on one of the column headings in blue the window will be sorted according to this column. You can sort the surveys according to:

- Type
- Name
- Status
- Form
- Created (date)
- Processed (date)
- Recorded (number of returns)

Survey Status: In progress

Cover Sheet Procedure:

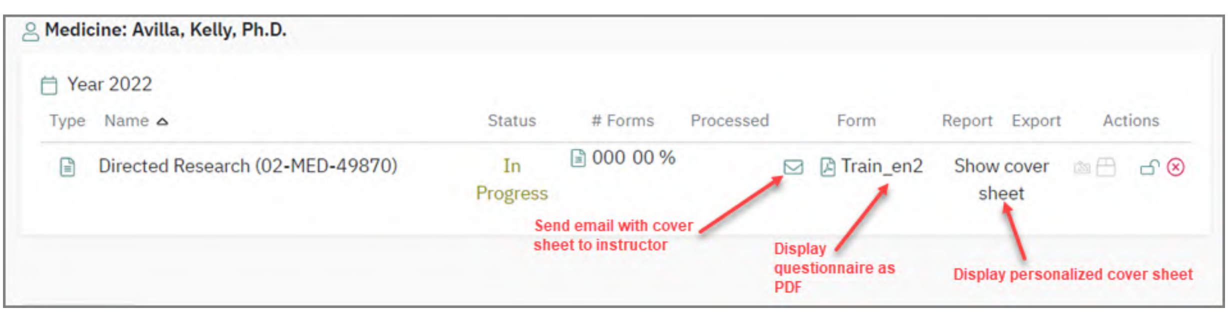


Figure 221: Survey Status: Cover sheet procedure – In Progress

Hard Copy Procedure:

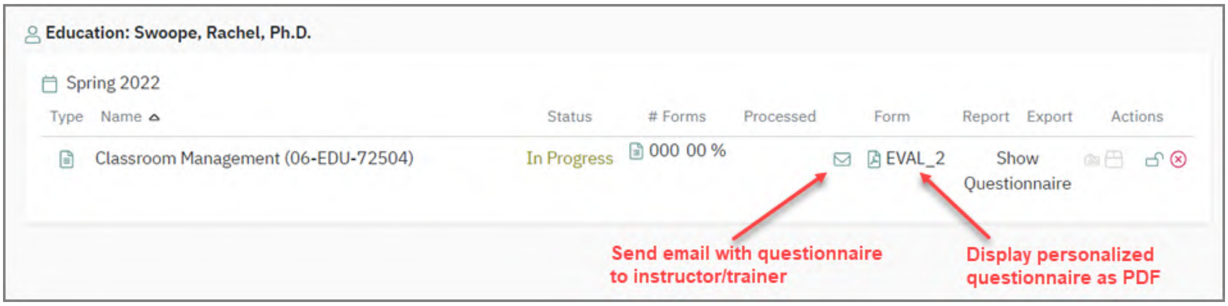


Figure 222: Survey Status: Hard copy procedure – In Progress

Online Survey:

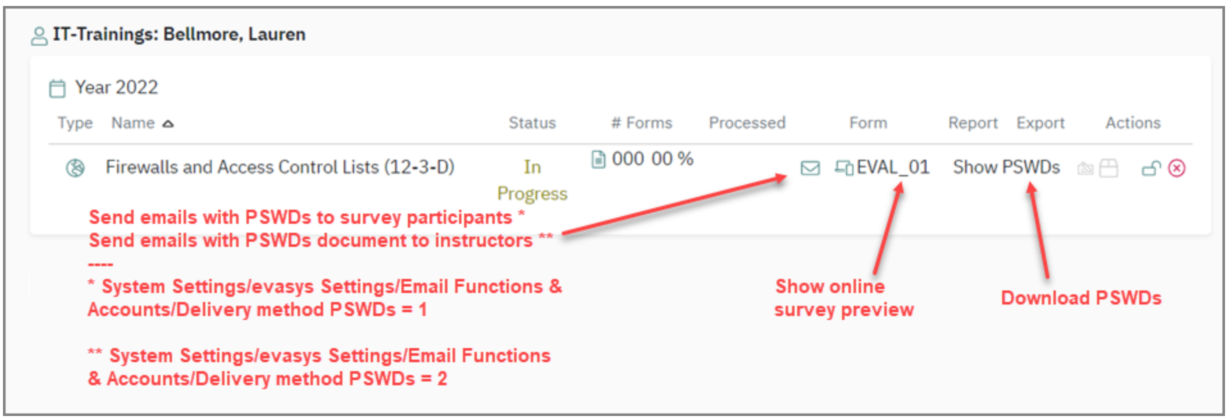


Figure 223: Survey Status: PSWD based Online survey – In Progress

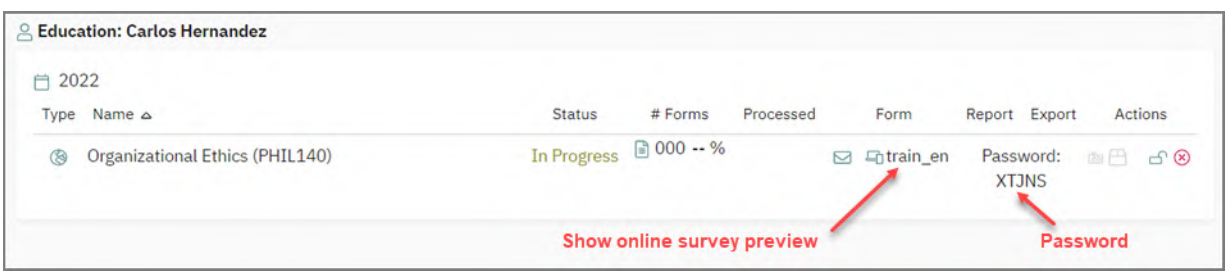


Figure 224: Survey Status: Password based Online survey – In Progress

Survey Status: Verification

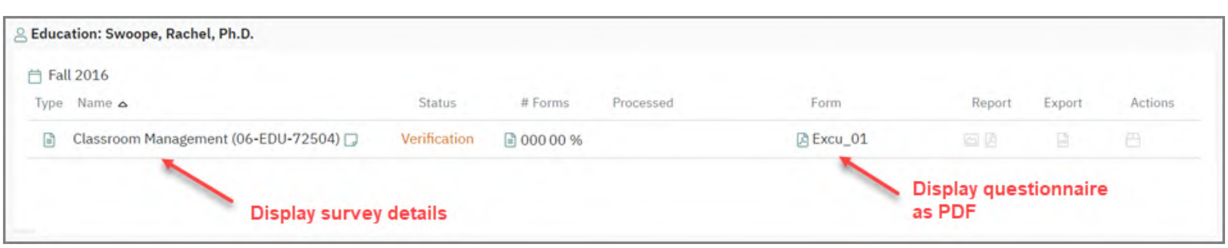


Figure 225: Survey Status: Verification

Survey Status: Data available/Data entry

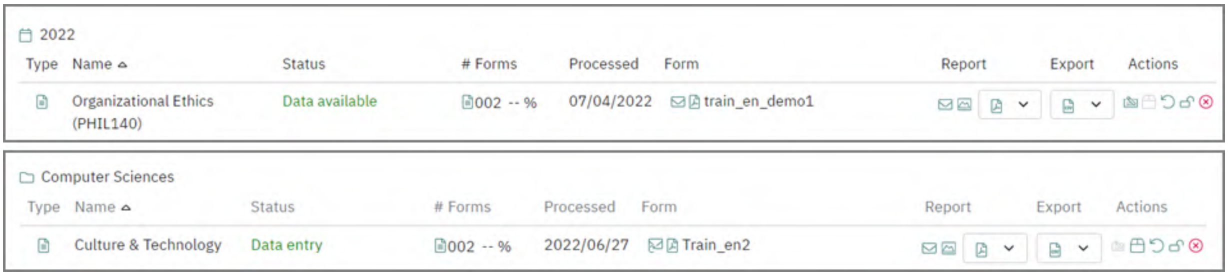


Figure 226: Survey Status: Data available/Data entry

Survey Status: Data Deleted

(only when function “delete in 2 steps” has been activated)

Figure 227: Survey Status: Data Deleted

Survey with status “Data Available” marked red

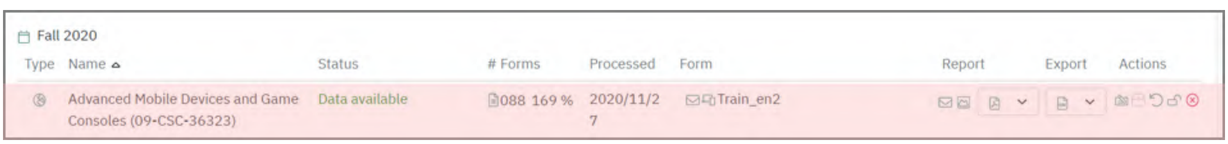


Figure 228: Survey with status “Data Available” marked red

There are two reasons for a survey to be marked red after it has been scanned: Either the OMR error threshold has been reached, that is, the VividForms Reader could not find every check box on the form (because, for example, the scanner is dirty, the batch was crooked, etc) or the number of NonForms in the batch scanned was too high, that is, there were too many pages in the batch which were not recognized as forms.

Both values can be checked under “System Settings/evasys Settings/Survey”. The first case comes under the setting “Warning threshold (in percent) for recognition problems during the processing of paper forms”. The second case comes under the setting “Warning threshold in % for PDF report dispatch by email” (compare chapter D 2.5.3. “Survey”).

In each case, the PDF report is not automatically sent. Also, the evasys administrator will receive a warning via email.

To prevent these errors from occurring again, the cause of the faulty reading should be checked. You can check what caused the problem (check boxes not found or too many NonForms) by taking a look at the survey details under “Survey evaluation statistics” (see also chapter D 1.5. “Evaluation Statistics”).

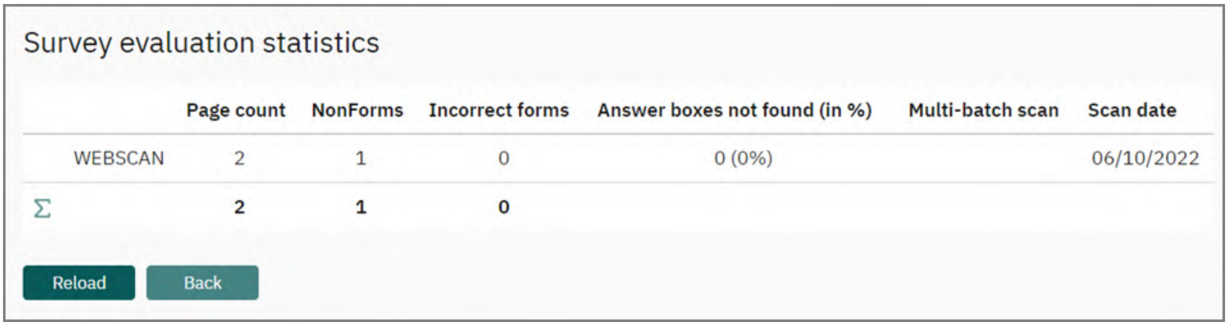


Figure 229: Survey Evaluation Statistics in Survey Details

Depending on the severity of the failure, you can decide whether you wish to manually send the PDF report or reset the survey and rescan it. If the error occurs again after rescanning, you should check both the scanner and the questionnaire.

3.17. Survey Details

- Display of Survey Details
- Number of Participants to Calculate the Response Rate
- Check Responses to Open Questions
- Assign a Survey to a Substitute Instructor
- Editing/Displaying Notes
- Show recognized form originals as PDF
- Post-processing of raw data
- Maintenance

3.17.1. Display of Survey Details

In order to display more detailed information about the survey you can click on the survey name. Now the survey details are displayed. In case of single password surveys you can directly access the survey by clicking the link in the line “Questionnaire”. In addition, in this view you have access to all functions of this survey.

Some functions can only be accessed using this detail window. Depending on the status of the survey (e.g. ready, data available), the survey type and further attributes specific to the questionnaire or survey (e.g. language, PSWD status), a variety of survey data and functions will be made available.

At the top of the Detail Window you can see the header data for the survey. By clicking the course name you can change to the course list in which the corresponding course is displayed. Click the questionnaire name to open the sample preview of the questionnaire.

In the lower left-hand corner you can see a number of options relating to the survey and in the lower right-hand corner you can select the evaluation report and export format.

The following table gives you an overview on the actions concerning surveys.

Action	Description	Survey Type	Survey Status
Delete survey	Deletes the survey	All	All
Restore survey	Deletes the response data of a survey. The survey remains in the status “ready“	All	Data available
Unlock data collection/ Finish data collection	Opens or closes a survey. If closed, no data can be submitted to the survey	All	All
Show PSWDs in browser	Generates and displays a PDF document containing the PSWDs of a survey	Online Hybrid	All
Receive PSWDs by email	Sends an email with the PDF document containing the PSWDs to the owner of the survey	Online Hybrid	All
Send PSWDs to respondents by email	Batch emailing of the PSWDs to the respondents	Online Hybrid	All
Download PSWDs in CSV file	Allows the download of a text file containing all remaining PSWDs for a survey	Online Hybrid	All
Generate more PSWDs	Allows the generation of additional PSWDs for an existing online survey	Online Hybrid	All
Number of participants to calculate the response rate	Here the number of participants can be adapted if required (by default using the course information)	All	All
Preview online survey	Opens a window with a preview of the online survey	Online	All
Scheduled Tasks	Shows the scheduled tasks linked to the survey, such as PSWD submission, reminder submission or reporting	Online	All
Convert survey to password based survey	Convert a PSWD-based survey retroactivly to a password based survey	Online	Ready
Download the QR code for this survey	Provides a PNG file containing the QR code for a password based online survey	Online	All
Share survey link	Places a link to a password based online survey on the social networks Facebook, Twitter, and Google+	Online	All
Change password	Allows you to manually change the password for a password based online survey	Online	All
Send password to participants via email	Sends the password to the participants	Online	All

Show cover sheet/form in browser	Opens the personalized cover sheet or the questionnaire of the survey as PDF file in the browser	Paper	All
Email cover sheet/form	Sends the personalized cover sheet and/or form to the owner of the survey by email	Paper	All
Check answers to open questions	Shows the list to check/delete single answers to open questions (if open questions are existent)	All	Data available
Assign survey to a substitute instructor	Allows a survey to be assigned to a another user, for example to include a substitute instructor	All	Data available
Edit/display notes	Here, existing notes on surveys can be viewed or amended.	All	Data available
Categorize answers to open questions	Single answers on open questions are assigned into categories	All	Data available
Survey ID	Here, you can change the identification of the survey (= survey -ID). (Attention: Not available in “Web verifier” mode.)	All	Data available
Show recognized form originals as PDF	Here the recognized answer boxes of the scanned questionnaires can be displayed.	Paper	Data available
Delete original scanned files of recognized forms	Here you can delete all scanned original sides of a survey	Paper	Data available

Table 10: Overview on the Actions Concerning a Survey

In the following graphic, you can see header data, actions and the maintenance of an email merge survey. There are not yet any data available for the survey. You can only display the questionnaire here, finish the data collection (close survey), delete the survey, assign the survey to substitute instructor, edit/show notes and change the survey ID.

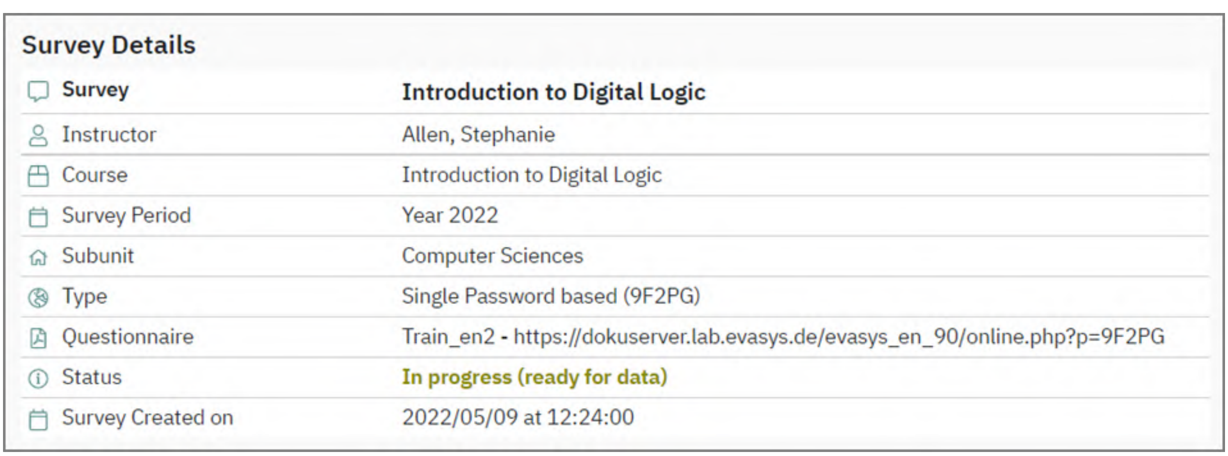


Figure 230: Survey Details: Status In Progress (Ready for data)

In the following graphic you can see the evaluation possibilities of a survey, for which data is already available. In this case, considerably more options are available to you. Here you can, for example, display the results in different export formats (i.e. PDF, CSV, SPSS).

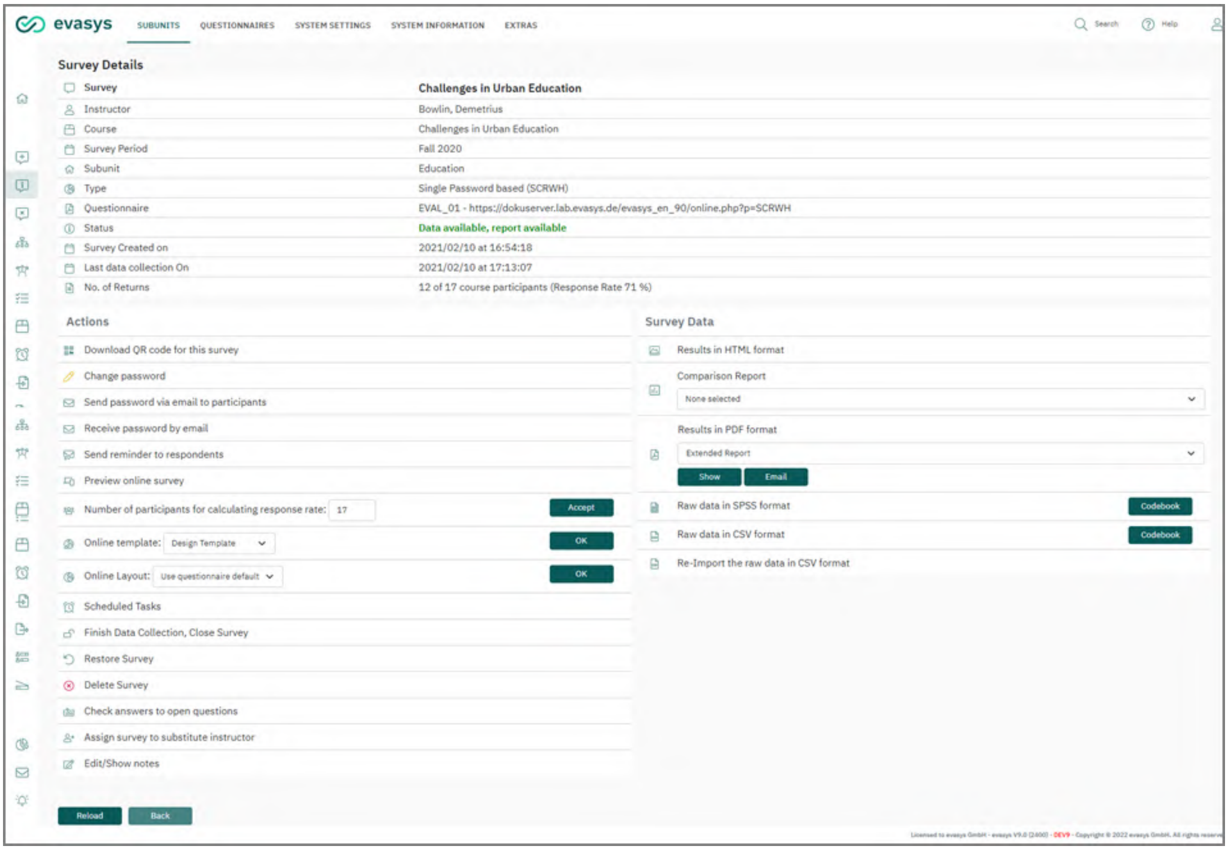


Figure 231: Survey Details: Survey Status Data available

If your questionnaire is multilingual then you have the option in this view to display the form in the various languages.

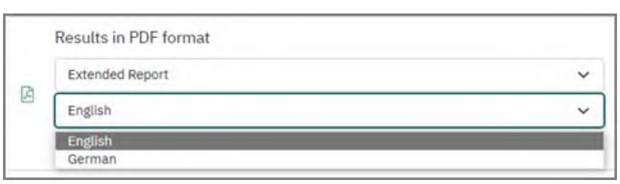


Figure 232: Select Report Language

After scanning the questionnaires you can display the PDF report in the language of the questionnaire.

In the PDF report you will see the text of the letter or the legend in the linked system language. All of the questionnaire texts are produced in the selected language.

If reports have already been created on the basis of the questionnaire used, it is possible to display these data as comparative profile lines in the PDF report. To do this, select the relevant report from the area “Comparison Survey” and open the PDF report. The profile line will now be automatically extended by a comparative line. To create the comparative reports with the report creator, please see chapter B 5.2.3. "Creating Summary Reports".

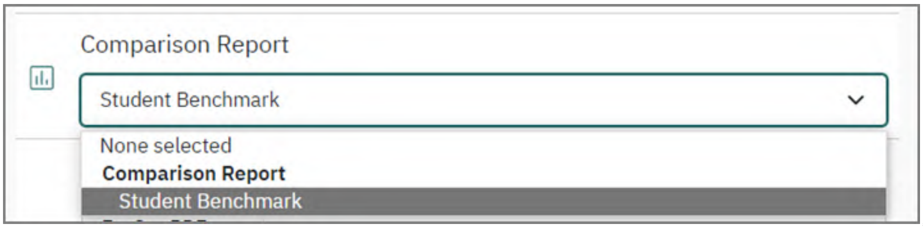


Figure 233: Comparison Surveys for the PDF Report

3.17.2. Number of Participants to Calculate the Response Rate

By default, the number of participants deposited in the properties of a course is used as the number of participants of the survey. This is stated in the details of a survey. It serves as the basis for calculating the response percentage of a survey, if the mode of calculation in the central system settings is set on the number of course participants ("System Settings/evasys Settings/Survey/Method of calculating the response rate").

Should a different number of participants be noted in a new survey period for a course surveyed several times (i.e. by importing new participant data), this number is adopted for surveys of the current and future periods. Surveys of this course from past survey periods show the original number of participants in the survey details, so that the response rates of past surveys are also calculated correctly.

In some cases, it may be necessary to change the number of participants retrospectively, if, for example, the number of participants needs to be changed for a period that has expired. To do this, the corrected number of participants can be deposited in the survey details and with a click on [Accept], saved for the survey. The response rate, appearing in the survey overview or in the survey details or in the PDF report, is now based on this corrected number of participants.

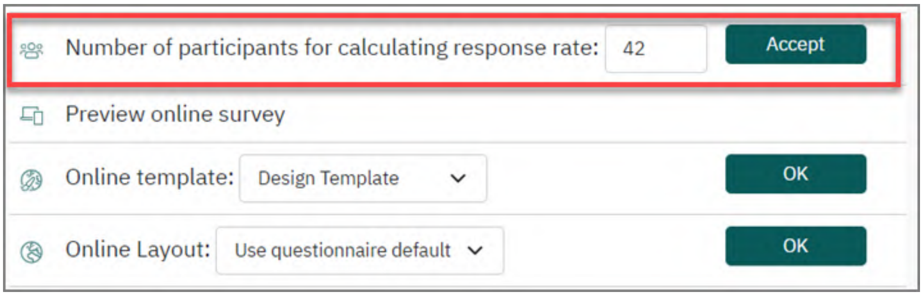


Figure 234: Survey Details: Number of Participants to Calculate the Response Rate

Note:
The number of participants noted for the survey only influences the calculation of the response rate. Functions such as batch printing of questionnaires are not influenced. In the system settings the number of participants must be selected as the method of calculation for response rates (“System Settings/evasys Settings/Survey/Method of calculating the response rate“).

3.17.3. Check Responses to Open Questions

As Administrator you have the option to check or delete responses to open questions. In this case, responses from online surveys or responses captured by the data entry assistant can not only be removed but also edited to eliminate typos or remove names. If the responses from a paper-based survey are only available as an image, they can be only deleted. This is especially helpful when empty fields have been crossed out.

In order to use the check/delete function, it must be activated in the settings (“evasys Settings/Data Privacy/Check answers to open questions”). In general, the setting should be activated by default.

Afterwards you will see a symbol for checking selected answers to open questions in the survey overview in the column “Actions”. This symbol is only displayed in color (actively) if there are answers to open questions for the survey.

With a click on the icon you will open the window with all of the responses to the open questions of this survey. Alternatively, see the entry „Check answers to open questions“ in the details of your survey.

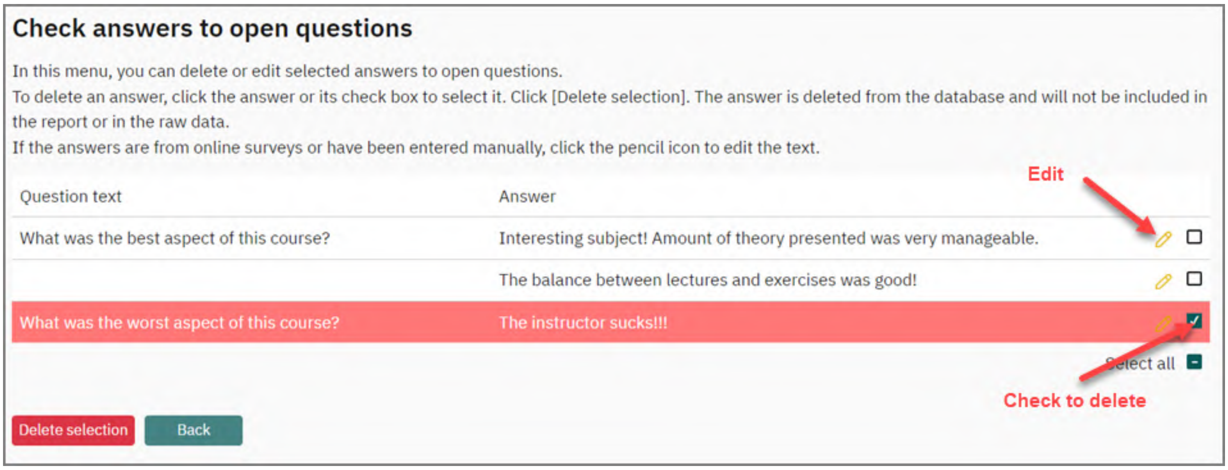


Figure 235: Check or delete answers

The responses are either displayed as image or, if they have already been anonymized, as texts. Texts can be edited by clicking on the pencil icon. An edit box will open which allows you to adapt the texts.

You can furthermore select texts or images for deletion by checking the box on the right or by clicking on the text/image. Marked answers are highlighted in red. In order to delete all of the selected responses, mark the Select all checkbox and click [Delete selection] at the bottom of the window.

3.17.4. Assign a Survey to a Substitute Instructor

If a course is taken over by a substitute instructor at short notice, an evaluated survey can be transferred from the original instructor to the other instructor.

To do this, click within the survey details on “Assign survey to substitute instructor”:

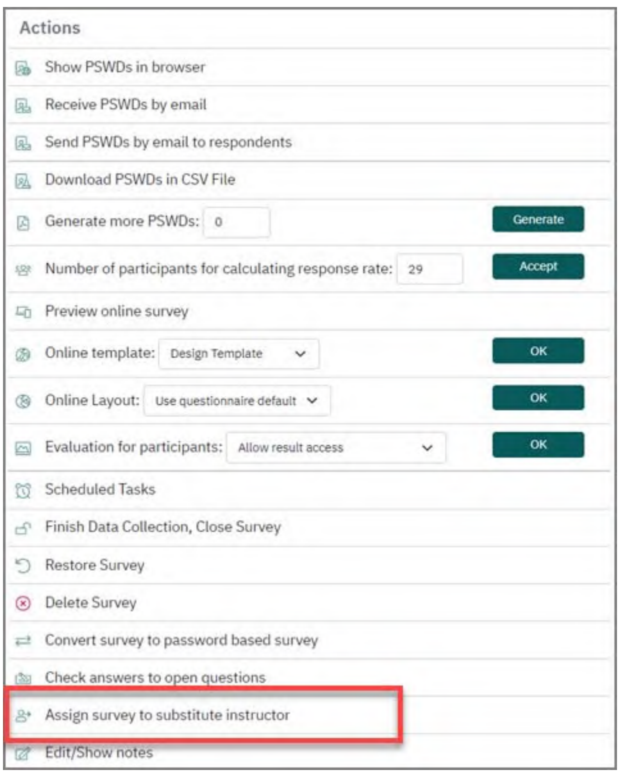


Figure 236: Survey Details: Assign this Survey to a Substitute

In the following dialogue you can select the subunit as well as a substitute from the list of instructors:

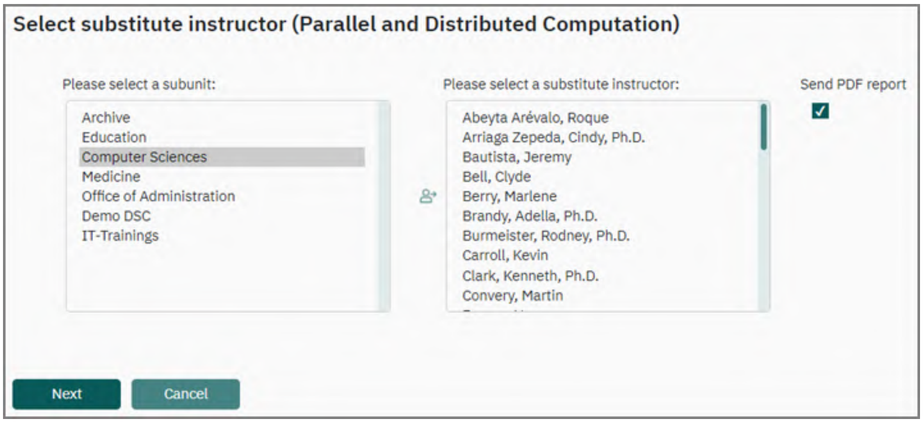


Figure 237: Select Substitute Instructor

The checkbox “Send PDF report” permits the dispatch of PDF reports to the substitute instructors again. To continue, click on [Next].

The survey will then be assigned to a substitute instructor (and is then no longer existent for the original instructor). If there is only one survey for the course that is to be moved, evasys will ask whether the associated course is to be moved as well:

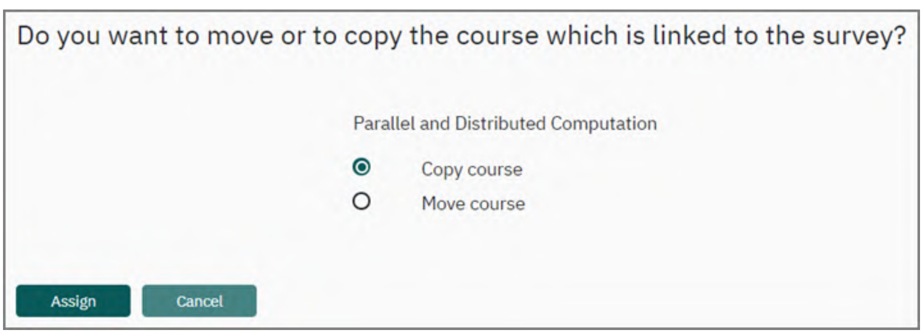


Figure 238: Selection Window: Copy or Move the Course

Click on [Assign] to complete the procedure.

If there are several surveys for one course, the course will always be automatically copied, since it has to remain with the original instructor for the assignment to other surveys.

3.17.5. Editing/Displaying Notes

The notes function supports the communication between the different user roles in evasys. A user can link a memo with a survey. Notes always refer, therefore, to a particular survey and their history is accessible to all users. All notes can be edited or deleted by the authors at any time.

This function is particularly useful in regard to the QM screens. The instructors can thus comment on the determined results. Deans or department heads can then inspect these notes as well as add their own.

To add a note to a survey, call up the survey details through a click on the survey name. Click on [Edit/Show notes]:

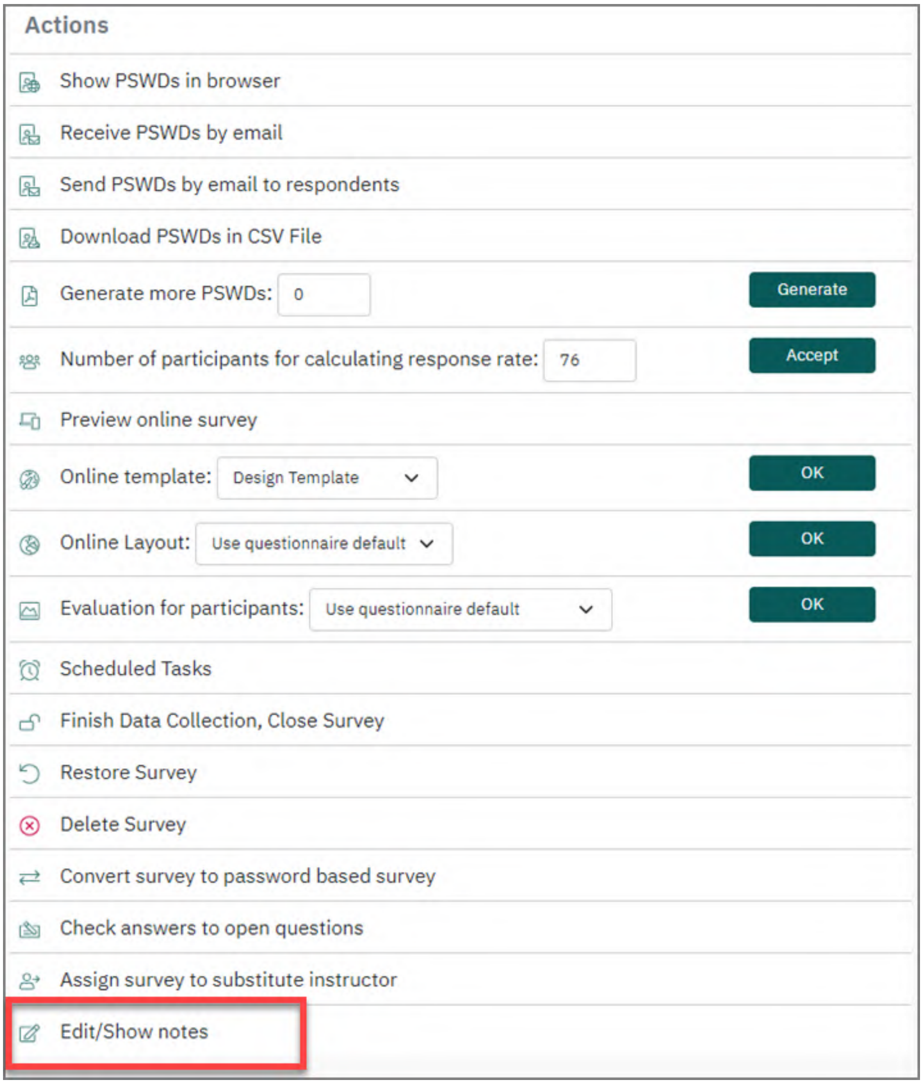


Figure 239: Survey Details: Add Note

Then click on [Add note]:

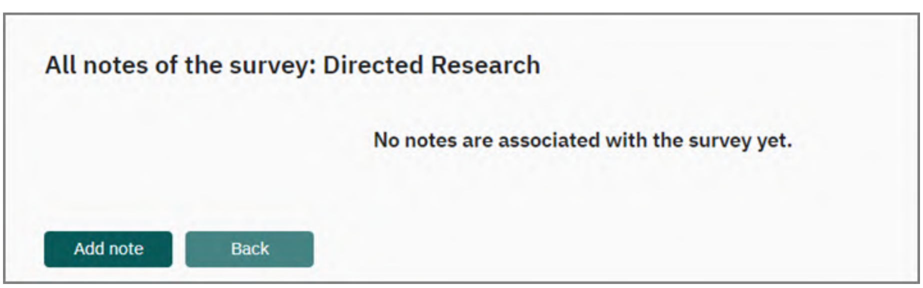


Figure 240: Add Note

An input window appears with which, text can also be formatted:

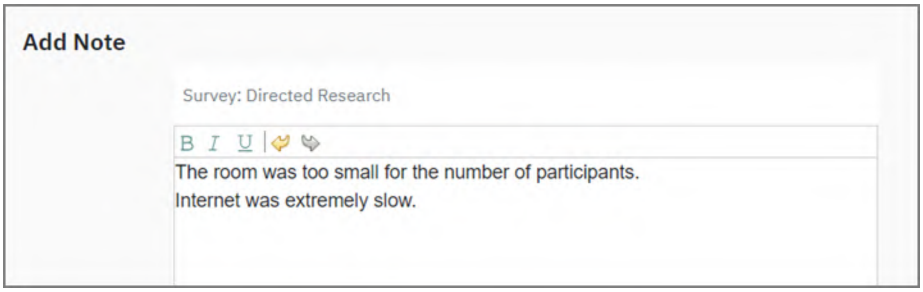


Figure 241: Editing a Note

After a click on [Save] the entries are saved. In the survey overview, an info icon now appears next to the survey name. When the mouse is moved over the icon, the most recently entered note appears in a window next to the cursor. When clicking the icon an overview opens which shows all notes deposited for this survey.

Figure 242: Course with Note

In the case of the QM screens, two types of symbols can appear in the column "Details":

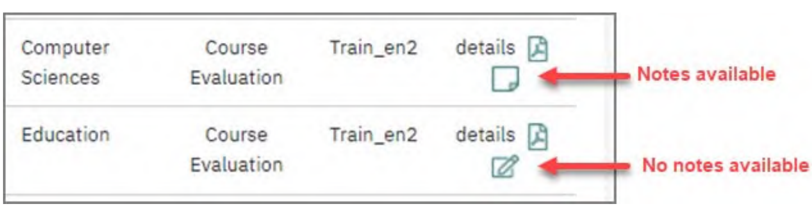
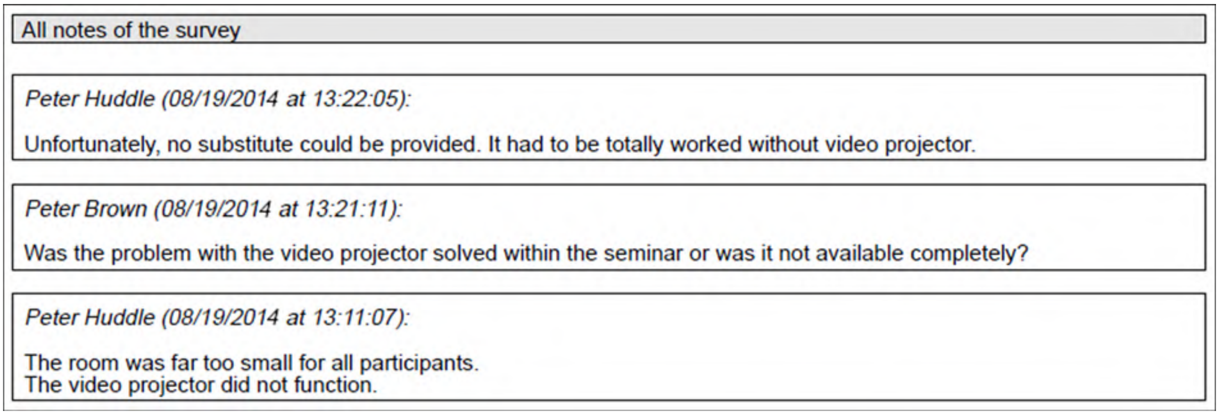


Figure 243: Notes in the QM-views

Editing notes later is only possible for the respective authors. Additionally, these notes can be displayed in the PDF report. To do this, activate the option "Show notes in the PDF report" under "System Settings/Report Settings/Configuration".



All notes of the survey

Peter Huddle (08/19/2014 at 13:22:05):

Unfortunately, no substitute could be provided. It had to be totally worked without video projector.

Peter Brown (08/19/2014 at 13:21:11):

Was the problem with the video projector solved within the seminar or was it not available completely?

Peter Huddle (08/19/2014 at 13:11:07):

The room was far too small for all participants.
The video projector did not function.

Figure 244: All Notes of the Survey in the PDF Report

3.17.6. Show recognized form originals as PDF

The option “Show recognized form originals as PDF” in the survey details allows the originally scanned forms to be displayed. The forms are displayed as a PDF file and can be opened as a whole or for each single questionnaire.

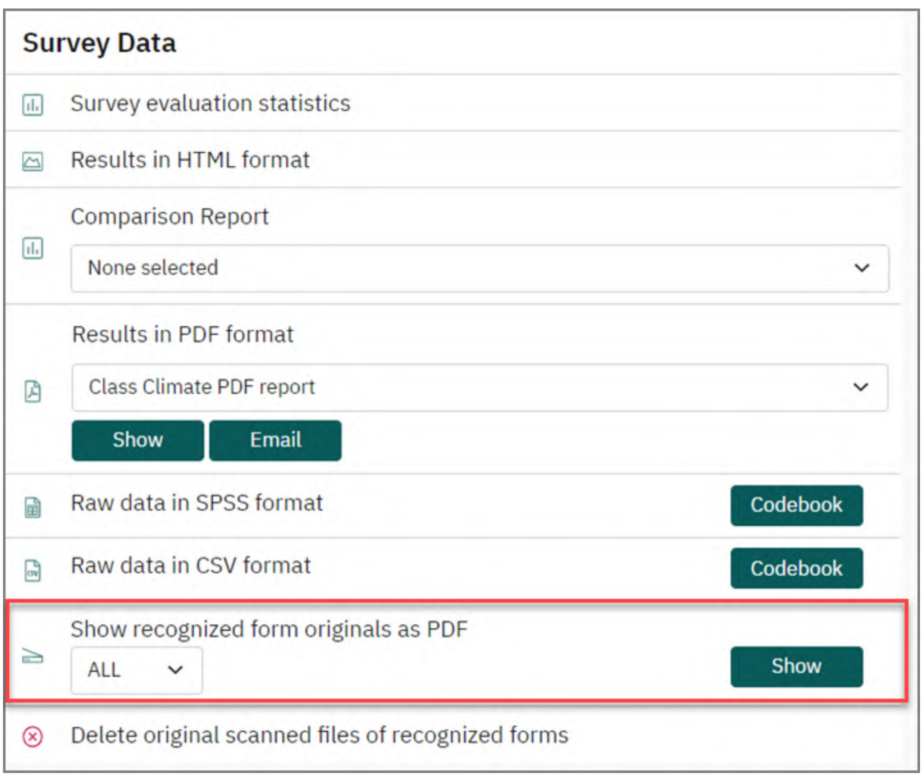


Figure 245: Survey Details: Show recognized form originals as PDF

After selecting whether you view the entirely or only one questionnaire, simply click on [Show]. The original scanned forms are displayed. Green boxes show which check-marks were recognized by the VividForms Reader and therefore provides a quick overview of the recognition process. This option is available for paper based surveys.

Figure 246: Show recognized form originals as PDF

3.17.7. Post-processing of raw data

(not Cloud Standard)

The raw data of surveys can be post-processed if required. This can be necessary if individual data sets were scanned-in incompletely or entries from participants need to be corrected, for instance where the polarity of a scale was mixed up. The answers to open questions for online surveys and surveys with data entry can also be adapted during post-processing and, for instance, names or improper comments censored.

The post-processing of raw data should only take place in emergencies and should always be carried out with great care. If post-processed data are imported into the system, the original data cannot be restored again without a backup file.

The possibility of post-processing raw data is deactivated by default. For this reason, firstly enable this function at “System Settings/evasys Settings/Data import and export/Re-Import of CSV raw data”.

After activation, the menu “Re-Import the raw data in CSV format” appears in the survey details in the “Survey Data” area.

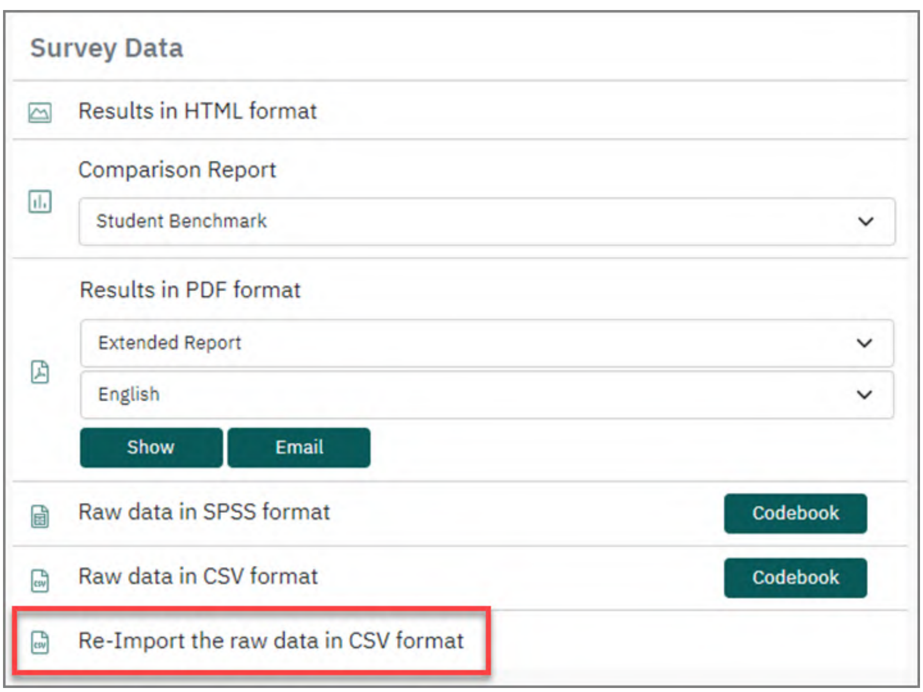


Figure 247: Re-import of raw data in the survey details

In order to post-process survey data, the raw data first has to be exported in CSV format. This can be done directly above the re-import function in the survey details.

Please ensure that you export the data in the survey details. You should not use the Data Import menu, as the raw data exported there is structured differently.

Note:
Before you process a CSV file, always save a copy of the original export file! Otherwise, you no longer have the possibility of restoring the original data after the import of post-processed data!

The exported CSV file can now be opened and processed, for instance in Microsoft Excel. Please observe the following:

- The question texts and the quire numbers must not be changed or moved (see illustration below, red area). Only the raw data may be adapted (see illustration below, green area).
- The raw data values of the individual questions may only be processed in the applicable value areas (i.e. only values between 1 and 6 in a scaled question with a scale of 6). Values outside the valid range are not imported and a corresponding message is issued. If values are missing in the original file, these can be updated in the corresponding fields.
- Only the already existing data sets can be processed, i.e. no further data sets can be added.
- You may not delete a complete data set. If you delete a dataset including the sheet number from the CSV file, the deletion is not retained when re-importing the file, i.e. the data remains unchanged.
- If you delete all the data of a data set without deleting the sheet number, the data will be removed from the data set when re-importing the file. The data set itself remains existent as an “empty” data set, i.e. it still counts into the number of returns for the survey.
- A maximum of 500 data sets can be imported during an import process. In the case of larger volumes of data, the import has to be done using several small files each with up to 500 data sets.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Sheet	Which gender	What is your a	What is your a	What is the gr	How many ter	Main subject	Do you alrea	The instructo	The instructo	The instructo	Please grade
2	1	2	3	51	3	2	3	1	4	1	2	4
3	2	1	3	19	4,2	6	6	1	1	4	2	1
4	3	1	6	59	1,2	5	23	2	2	2	5	5
5	4	2	1	39	4,1	3	27	1	5	3	5	4
6	5	1	2	59	2,3	10	13	2	4	4	5	2
7	6	1	2	27	4,7	8	13	2	5	5	4	6
8	7	2	1	18	2,9	9	3	1	3	5	1	4
9	8	2	6	46	0,5	2	22	1	1	6	5	2
10	9	2	5	41	3,4	8	13	2	5	3	3	1
11	10	1	4	39	0,6	7	4	2	5	6	2	3
12	11	2	1	50	3,7	9	6	1	6	6	2	3
13	12	1	6	95	2,3	5	3	2	2	5	2	6
14	13	1	1	58	4,8	7	16	1	2	5	2	5
15	14	2	1	70	4,6	2	11	2	1	1	4	5

Figure 248: Post-processing CSV raw data

After the raw data are post-processed, they can be imported into the survey details. To do this, click “Re-Import raw data in CSV format”. A dialog opens in which you can select the previously saved CSV file and upload it in the system by clicking the [Import] button.

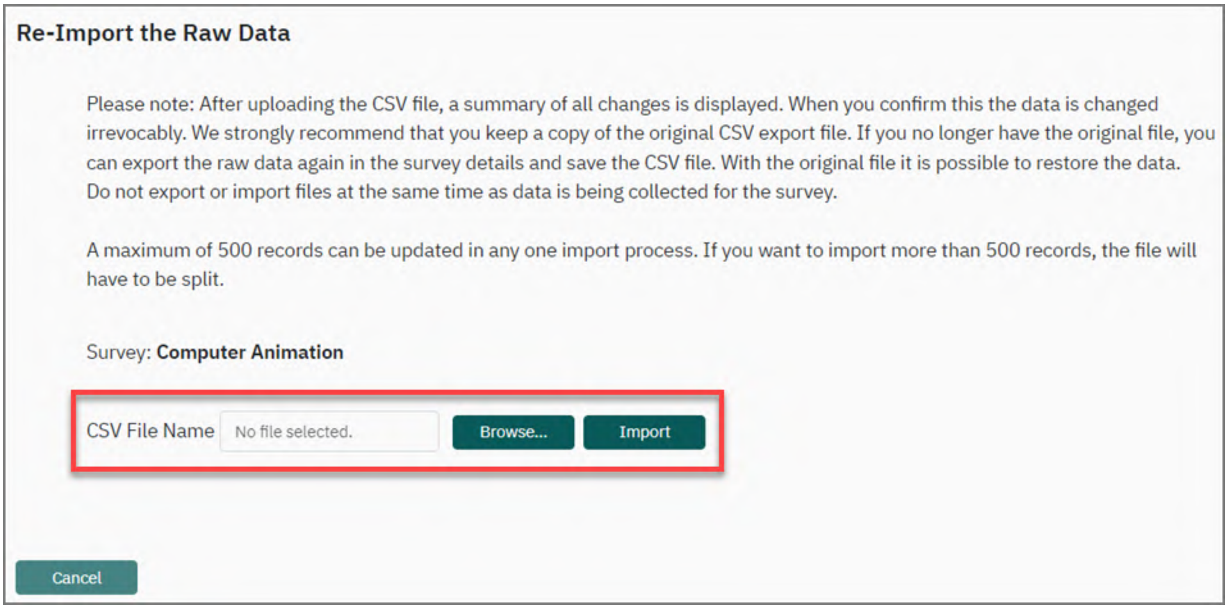


Figure 249: Importing post-processed CSV raw data

An overview opens in which the data of the import file are displayed. Changed values are highlighted in color. Information on the type of change is shown if you move the mouse over the Info character. In the example below, an entry on an open question is anonymized and the values adapted for several scaled questions.

Figure 250: Overview on re-importing data

After the post-processed data are imported, the PDF report can be accessed in updated form. The raw data now also contain the changed values when re-exported.

Note:
Please observe the following particularity of module surveys: If a change is undertaken to data in the raw data of the basic module course for which the general report is created, this change does not affect the raw data of the individual module parts and vice-versa. This means that for module surveys all parts of a module, as well as the entire module, have to be post-processed separately.

3.17.8. Maintenance

In the area of maintenance, you can change the survey ID, as long as the changing of the survey ID in Settings/evasys Settings/Maintenance is activated.

Figure 251: Change Survey ID

This can become necessary, for example, if you have distributed questionnaires in the self print process with a different/incorrect survey ID. To enable you to assign these completed questionnaires to your survey anyway, you must replace the ID of the existing survey with the survey ID of the questionnaires distributed.

Note:
You cannot change the survey ID if the results of the survey are in the “Web verifier” mode. This means, that the survey ID is protected while the results of your survey are being processed by the verifier. As soon as the verification is complete, you can alter the survey ID as accustomed.

Changing the survey ID leads to questionnaires already distributed no longer being able to be assigned to this survey! For this reason, only change the survey ID after careful consideration. Should you have any questions, our support team is happy to help.

To change the survey ID, enter your chosen ID in the survey ID field, and then click on [change]. The new survey ID must consist of five characters. The following window opens automatically:

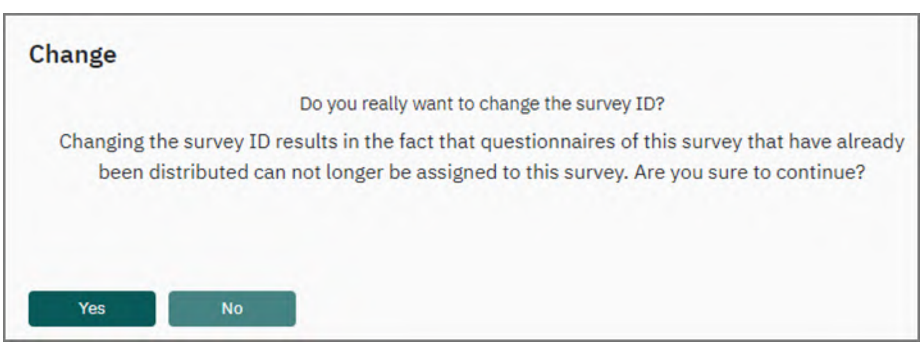


Figure 252: Confirmation of the Changing of the Survey ID

After confirming this prompt, your survey receives a new survey ID.

Note:
As a rule, you should only change the survey ID after careful consideration. Should you have any questions, please direct them to our support team.

3.18. Delete Survey

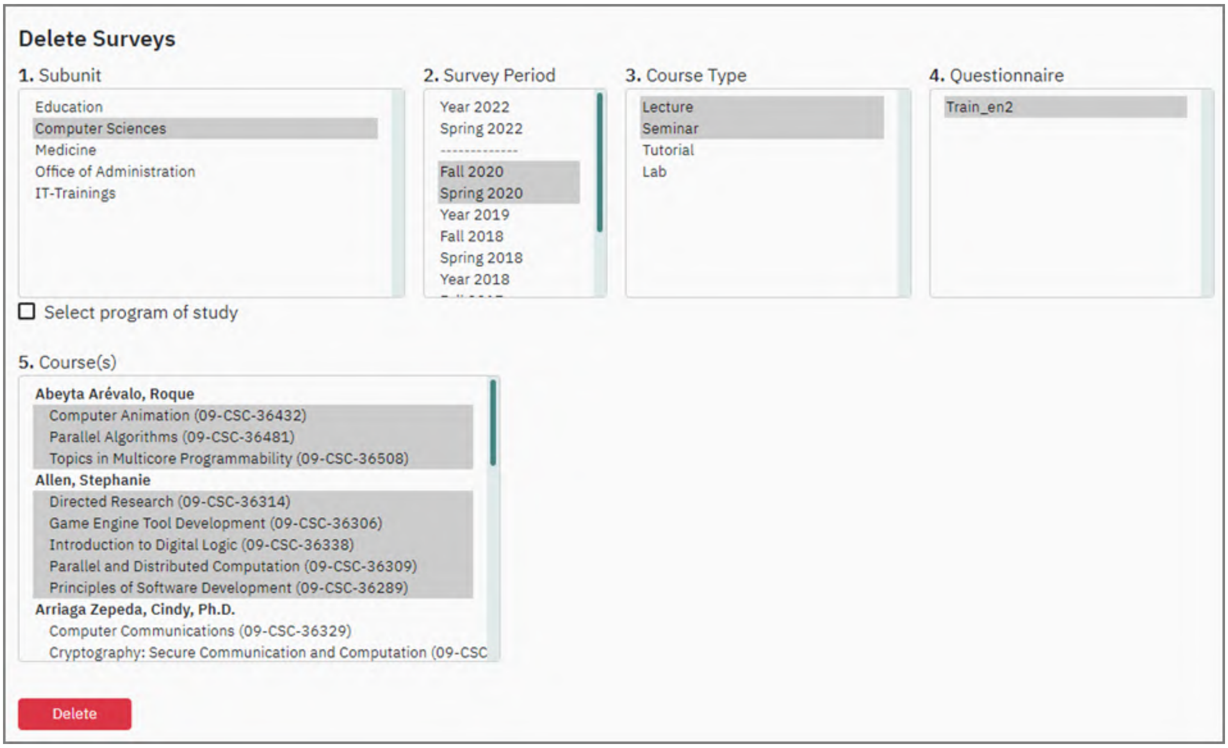


Figure 253: Deleting Surveys

This function allows you to delete large numbers of surveys.

As with all other dialogs you have an “intelligent” option which only displays the valid options.

Select:

1. One or more subunits
2. One or more survey periods
3. One or more course types
4. One or more questionnaires
5. One or more courses

After clicking on [Delete] the data will be deleted from the system.

The deletion process may take between a couple of seconds and a few minutes, depending on the amount and size of the surveys selected.

Note:

Please keep in mind that the deletion cannot be undone and that the deleted data is lost forever.

In order to save the raw data before deleting surveys use the archiving function.

3.19. Tree Structure

(not Cloud Standard)

In the menu “Tree Structure”, it is possible to view the structure of subunits, instructors and classes built in the system in a hierarchical tree structure. Also hidden layers such as the program of study or the user defined fields of a course can be made visible and used for survey administration. Furthermore, the features of display, creation and deletion of surveys as described in previous sections can be undertaken directly via the tree structure.

Displaying the organizational structure is enabled in the system by default. If necessary, this display can be switched in the system settings (“System Settings/evasys Settings/Functions/Open Tree Structure”).

The arrangement and number of levels displayed is preset in the menu “System Settings/Define Tree Structure”. As a framework here, the two levels “Subunit” and “Course” are displayed. If necessary, additional levels such as program of study, instructor etc. can be inserted.

In the drop-down menu below the structure list, apart from the instructor all levels which are linked with the course, i.e. program of study, room and the twenty user-definable data fields (in this example only two are used, namely language and location) are available.

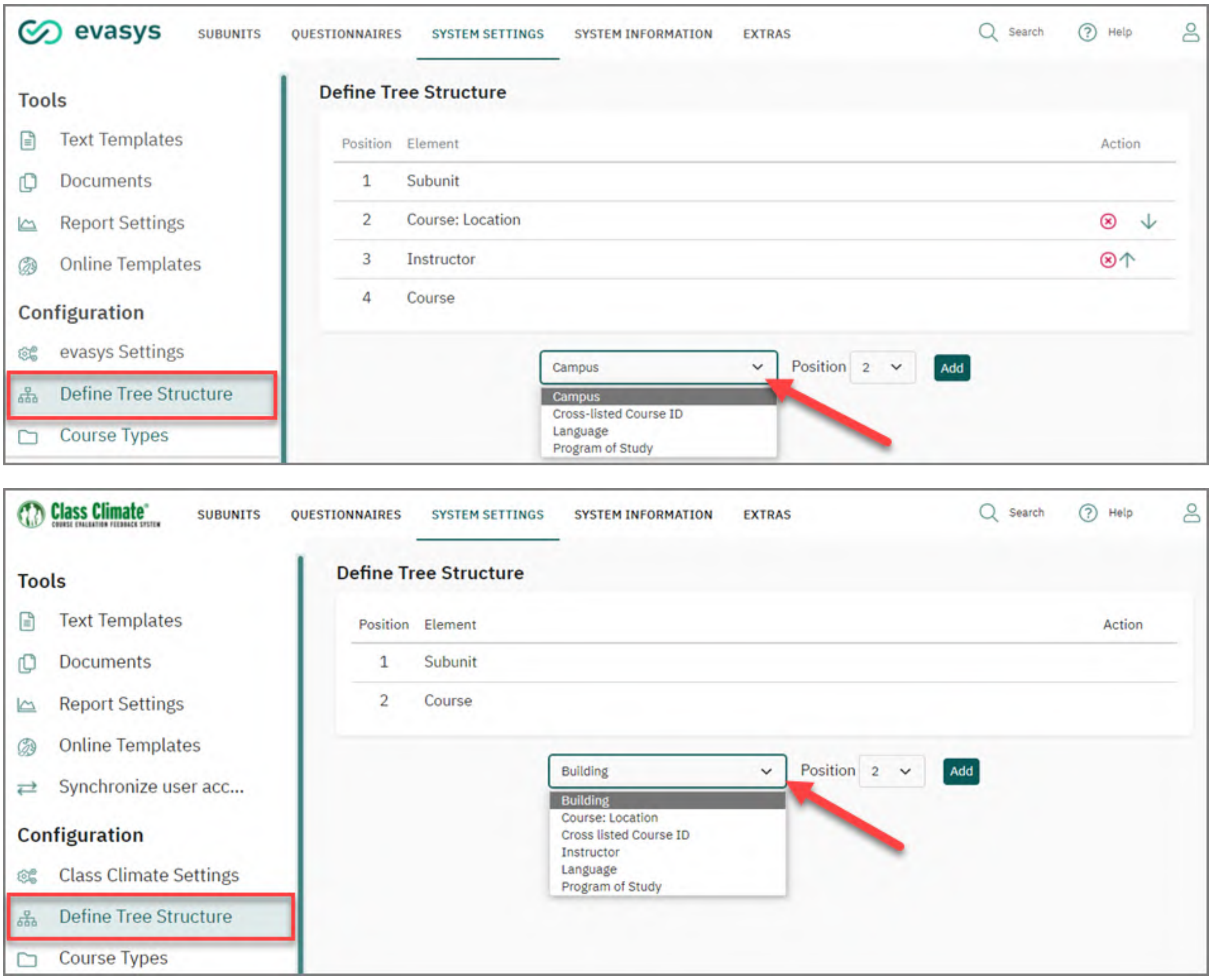


Figure 254: Setting up the Tree Structure

To add a level to the tree structure, select the appropriate level from the drop-down list and determine its position. Afterwards click [Add]. The selected level is now displayed in the desired location in the list of levels. Continue in the same way with all other desired levels.

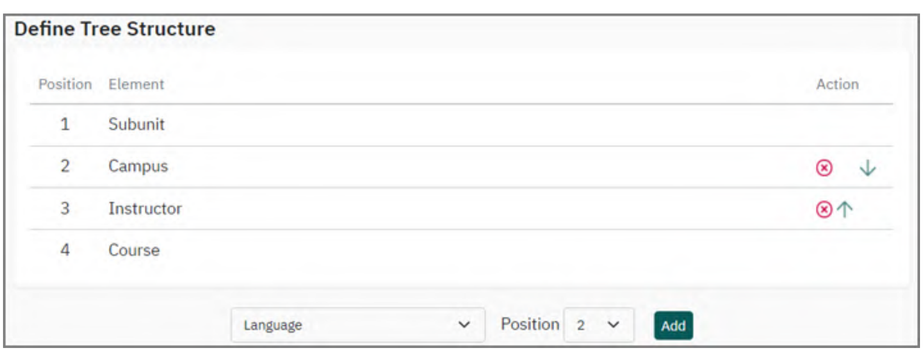


Figure 255: Edit the Tree Structure

The individual levels added can be moved up or down one step at a time retrospectively via the arrows in the area “Action”. With the help of the red cross icon, a level can be deleted from the list. The framework levels “Subunit” and “Course” can neither be moved nor deleted.

As soon as the tree structure has been set up in the menu “System Settings”, it can be displayed in the menu “Subunits”. To do this, click on the entry “Tree Structure” in the left context menu. The tree structure opens in an overview.

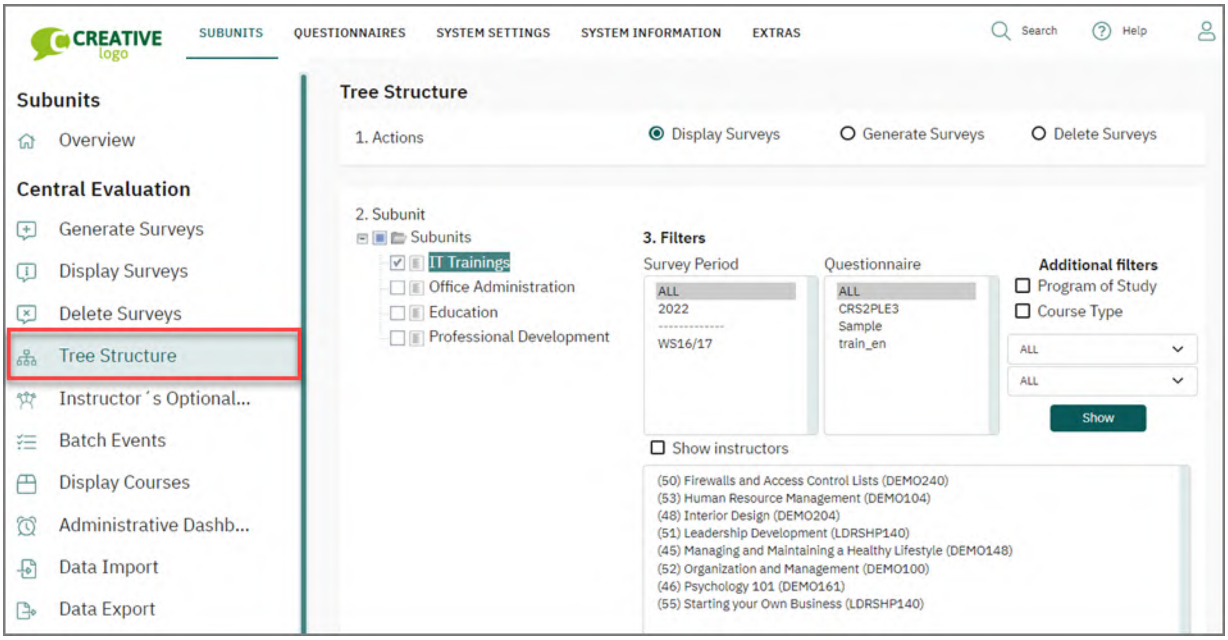


Figure 256: Tree Structure in the menu Subunits

In the header of the menu three different actions are available: Display Surveys, Generate Surveys and Delete Surveys.

In the left menu area, the tree structure of the organization is displayed. By clicking on the name of an element or the button [+], the respective underlying level can be opened up. Use the selection boxes next to the relevant entries to define which surveys or courses should be displayed in the right window. When an element of a higher level is selected, all elements on the levels below are automatically selected too.

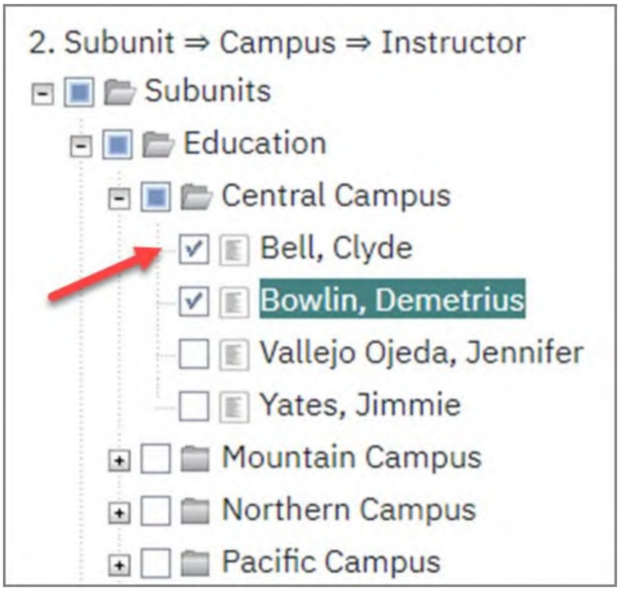


Figure 257: Tree Structure: Selecting the Levels

By clicking on the level name in the header of the list, all elements of a level can be displayed or hidden.

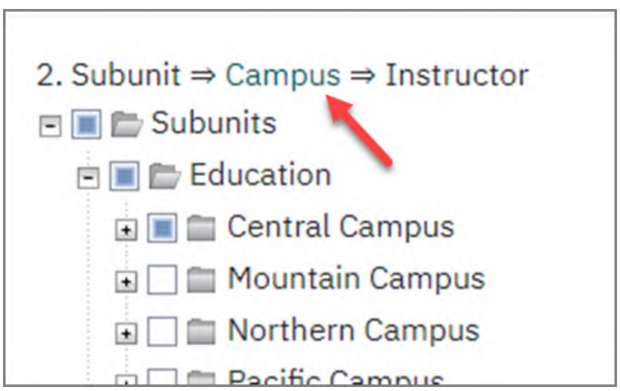


Figure 258: Tree Structure: Opening and Closing Levels

3.19.1. Display Surveys

To display surveys in the tree structure, select the option “Display Surveys” in the actions panel. On the left side, select the levels to be displayed in the view of the surveys you require, by checking the appropriate boxes. Then select the desired survey periods and questionnaires on the right. If necessary, these can also be filtered according to course type, by activating the option “Course Type”. The display can be refined by different types of surveys and status by using the drop-down menus.

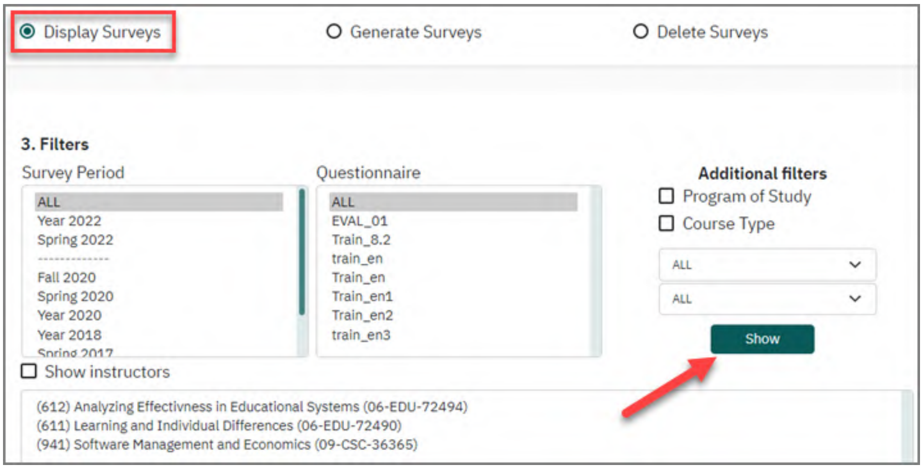


Figure 259: Tree Structure: Select Courses

By clicking on the button [Show], the courses are shown in the list. If required, the name of the instructor can also be shown by activating the option “Show instructors”.

By using the control button and mouse clicks, any number of courses can now be selected. After clicking on [Display Surveys] you are redirected to the survey list of the desired surveys.

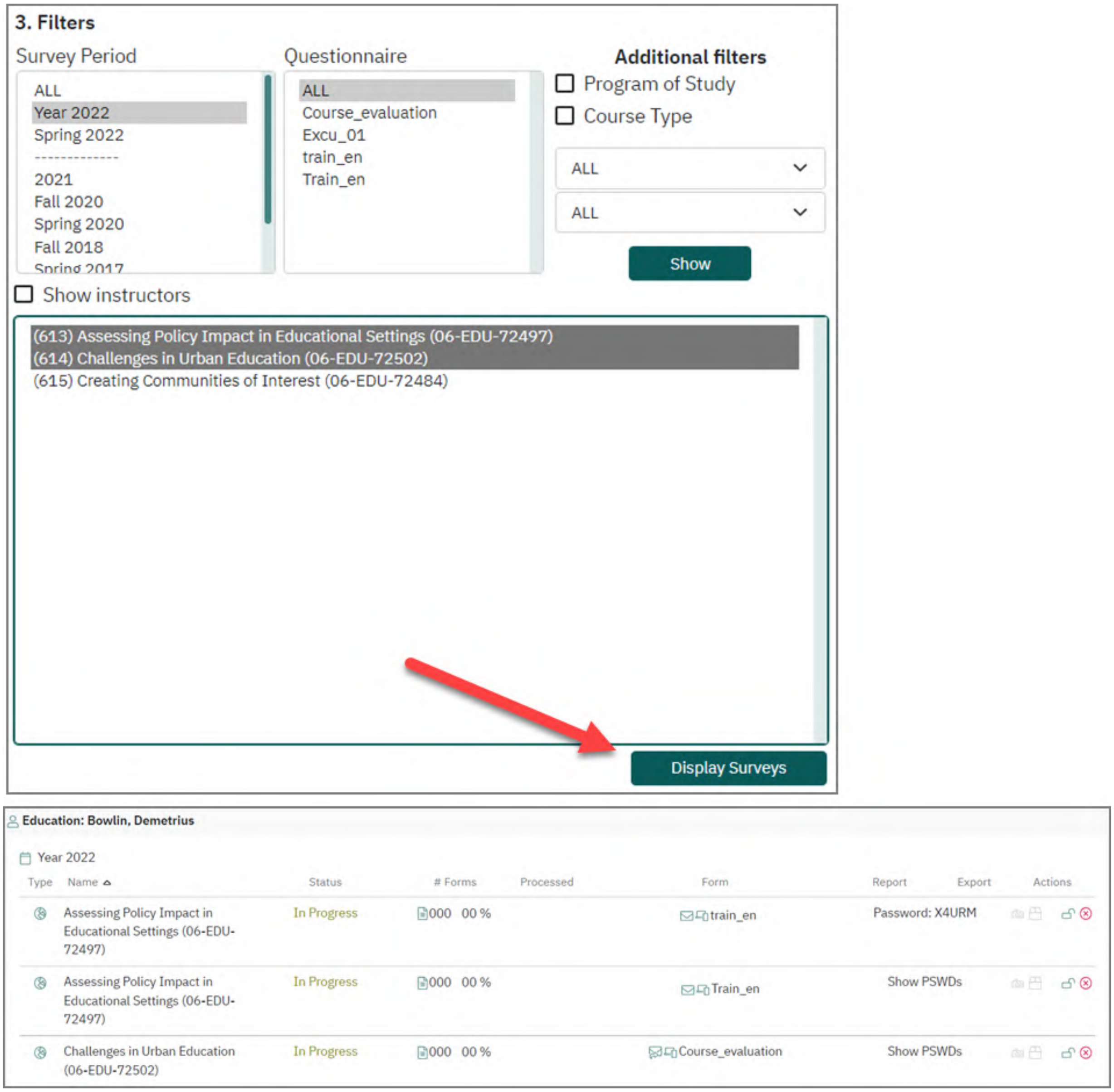


Figure 260: Tree Structure: Display Surveys

3.19.2. Generating Surveys

In order to use the tree structure to create new surveys, in the panel actions select the option “Generate Surveys”. On the left, select the levels in which you would like to generate the surveys by checking the appropriate boxes. Then, on the right, select the required survey periods and questionnaires. If necessary, you can also filter according to course type, by activating the option “Course Type”. By clicking on the button [Show], the courses are displayed in the list. If required, the name of the instructor can be displayed by selecting “Show instructors”.

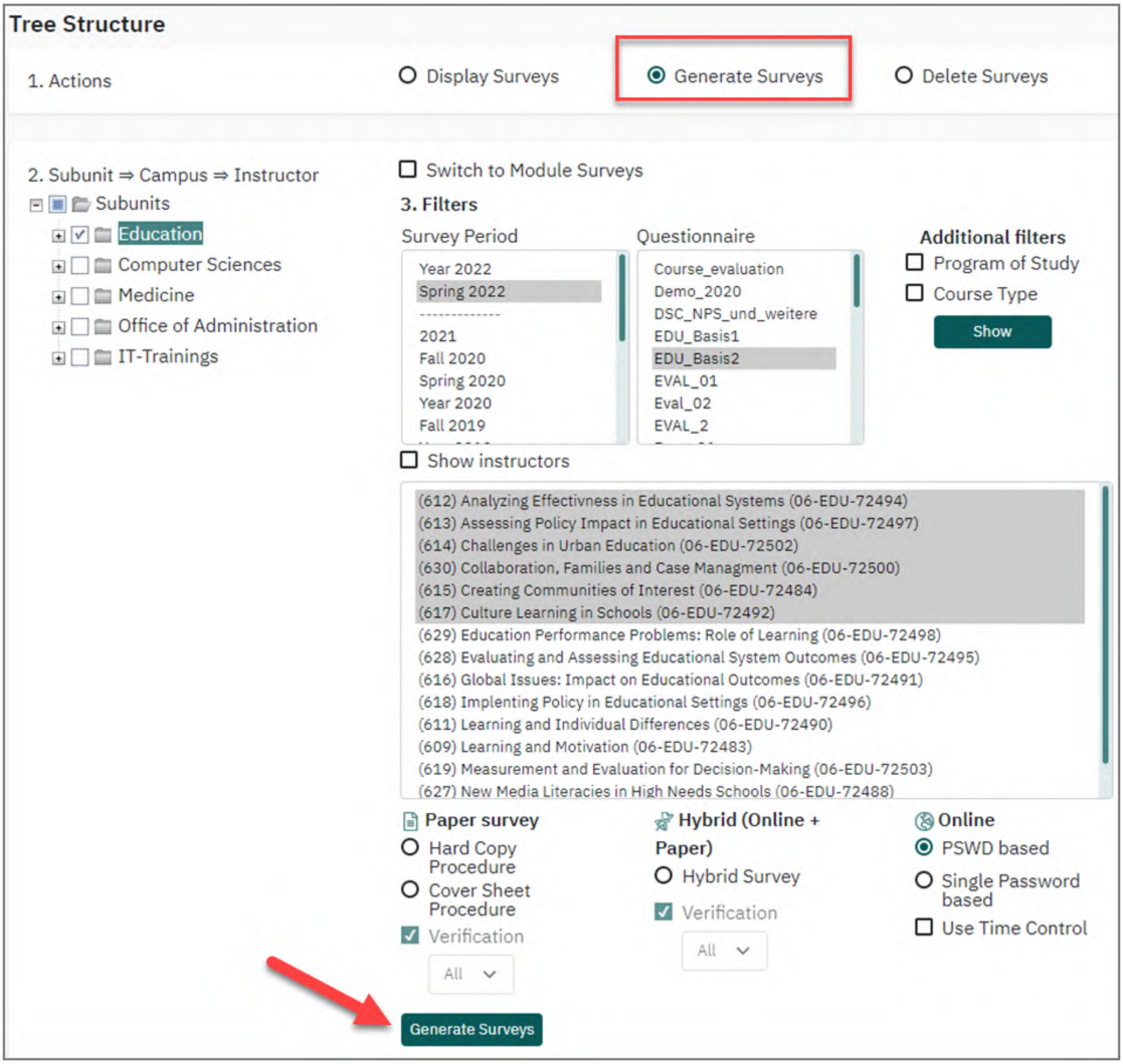


Figure 261: Tree Structure: Generating Surveys

By using the mouse and the control key, any number of courses can be selected for which a survey is to be generated. At the bottom of the window the various types of surveys and their additional options (verification, timing) are available. Select a type of survey and, if necessary, the additional options and click the button [Create Survey]. The survey is created and you will be automatically redirected to the survey list.

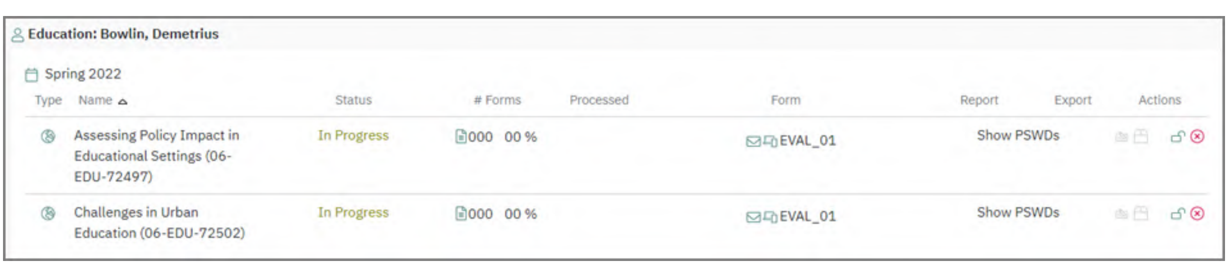


Figure 262: Tree Structure: Redirection to the Survey List

In addition to simple surveys, you can also create module surveys using the tree structure. To do so, activate the option “Switch to Module Surveys.” The System will then only display those subunits which contain modules. Select the period and the module, as well as the type of survey you wish to create, and click [Generate Surveys].

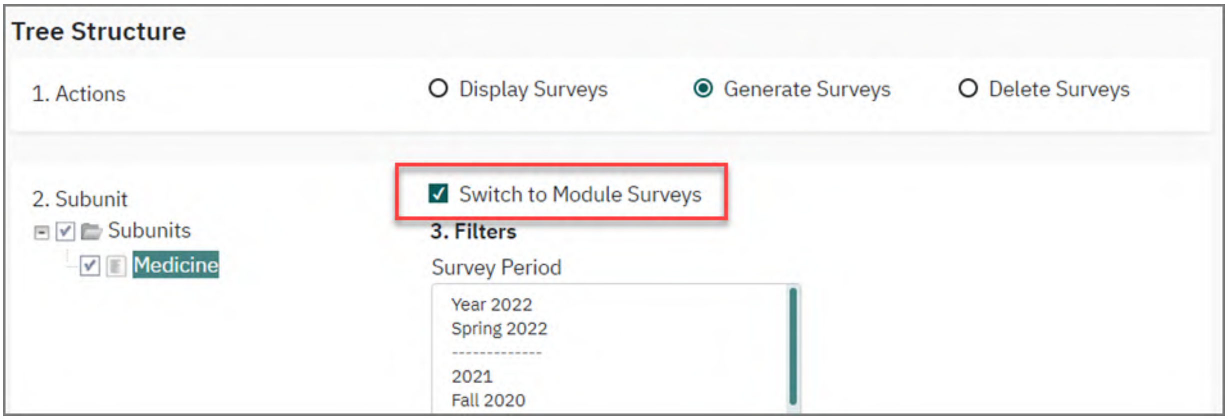


Figure 263: Tree Structure: Creating Module Surveys

3.19.3. Deleting Surveys

To delete surveys using the tree structure, select the option “Delete Surveys” in the actions panel. On the left, select the levels in which you wish to delete surveys. Then, on the right, select the desired survey periods and the questionnaires. If necessary, you can also filter according to course type, by activating the option “Course Type”.

By clicking on the button [Show], the courses are displayed in the list. If required, the name of the instructor can be displayed by selecting “Show instructors”.

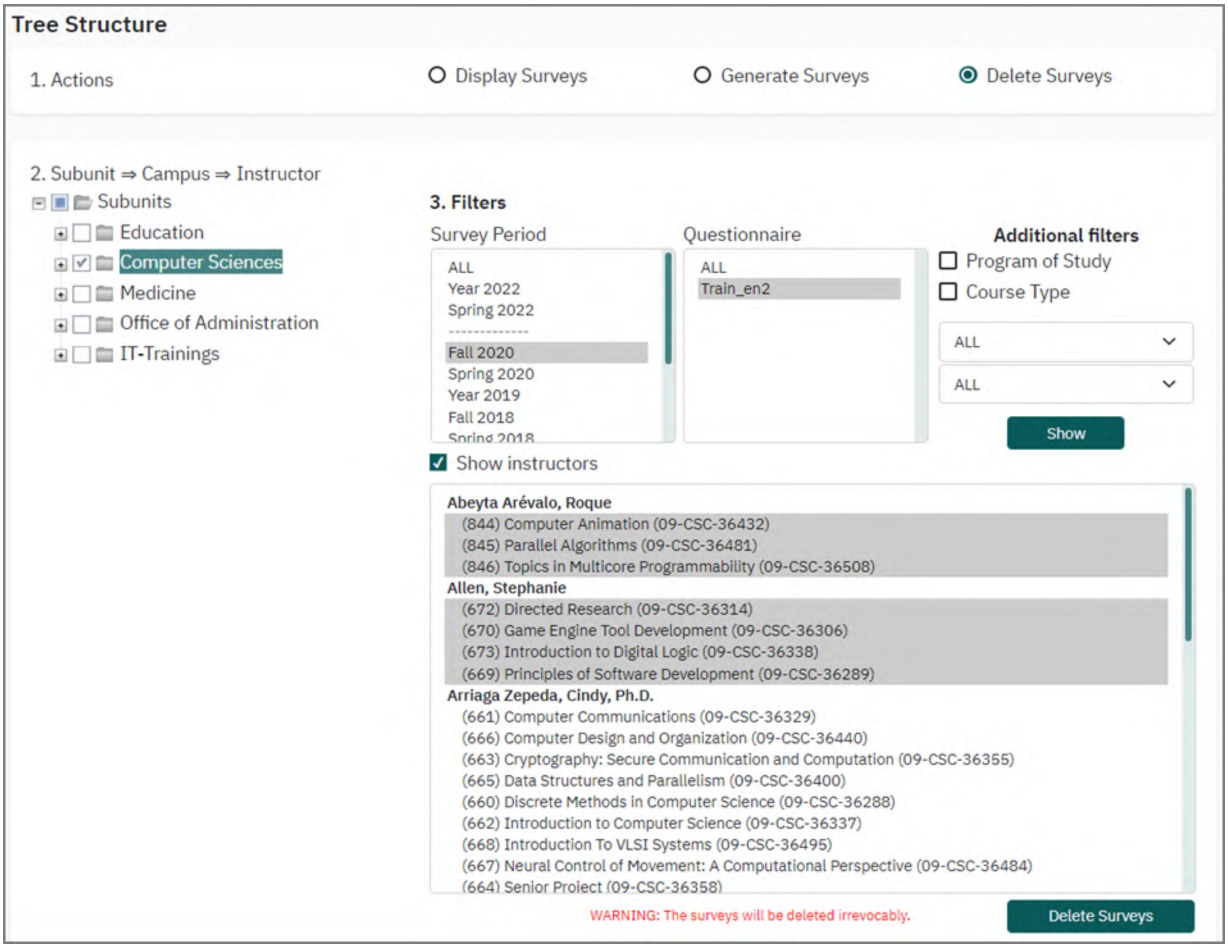


Figure 264: Tree Structure: Deleting Surveys

Select the desired course whose surveys are to be deleted and click on [Delete Surveys]. The surveys are now irrevocably deleted from the system.

Note:
The survey data will be irrevocably deleted and can only be restored with the help of a database backup.

Hint:
If you delete surveys, the reports based on the survey data created with the report creator remain untouched.

3.20. Adding Questions Using the Instructors Optional Questions

(not Cloud Standard)

The function “Instructor’s Optional Questions” was developed in order to give instructors, also in the Central Evaluation, the opportunity to create their own individual contents for the questionnaires for their courses.

The basic questionnaire remains unchanged, so that a central evaluation of the forms is still possible.

There are three different ways how individual questions can be added:

- Freely definable optional questions

  Instructors or project managers can use the VividForms Editor to add their own questions to the questionnaire. It is advisable to use the template mode in order to limit the number and position of additional questions.

- Predefined optional questions

  Instructors or project managers can add only predefined optional questions via an easy-to-use entry mask. The VividForms Editor is not required.

- Outcome-based evaluation

  Instructors or project managers can add special questions for outcome-based evaluation to the questionnaire. It is also not necessary to use the VividForms Editor, the learning objectives are entered via an easy-to-use entry mask.

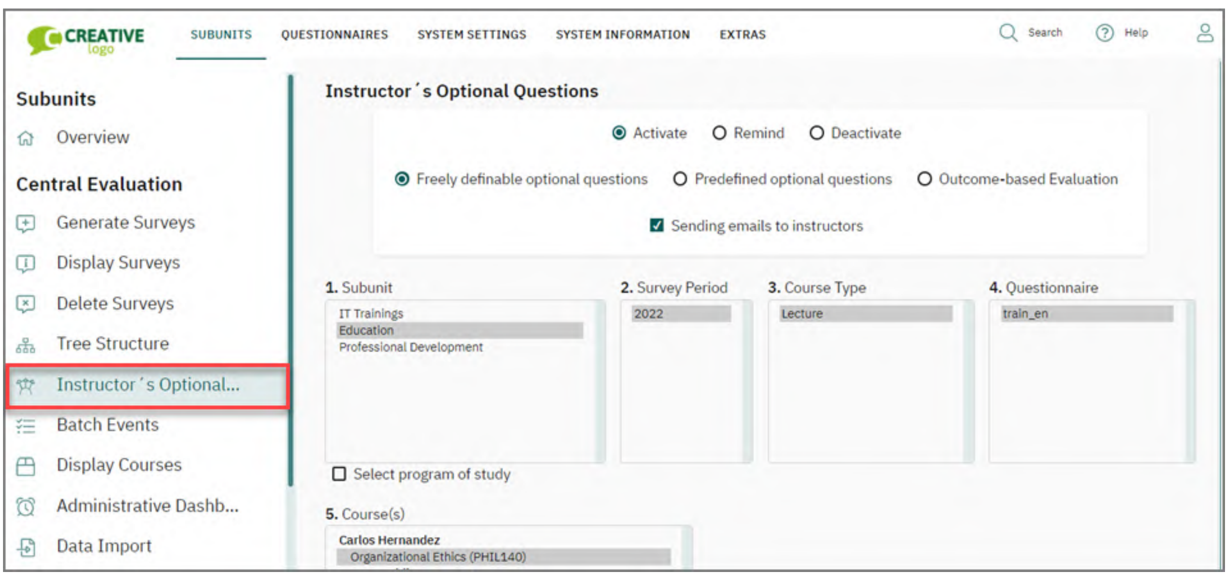


Figure 265: Entry mask for optional questions

For all three methods the questionnaire must be prepared and configured beforehand in the VividForms Editor. The type of optional questions is defined in the questionnaire settings. The settings can be opened by clicking on the menu entry “Form Properties” in the header menu of the VividForms Editor.

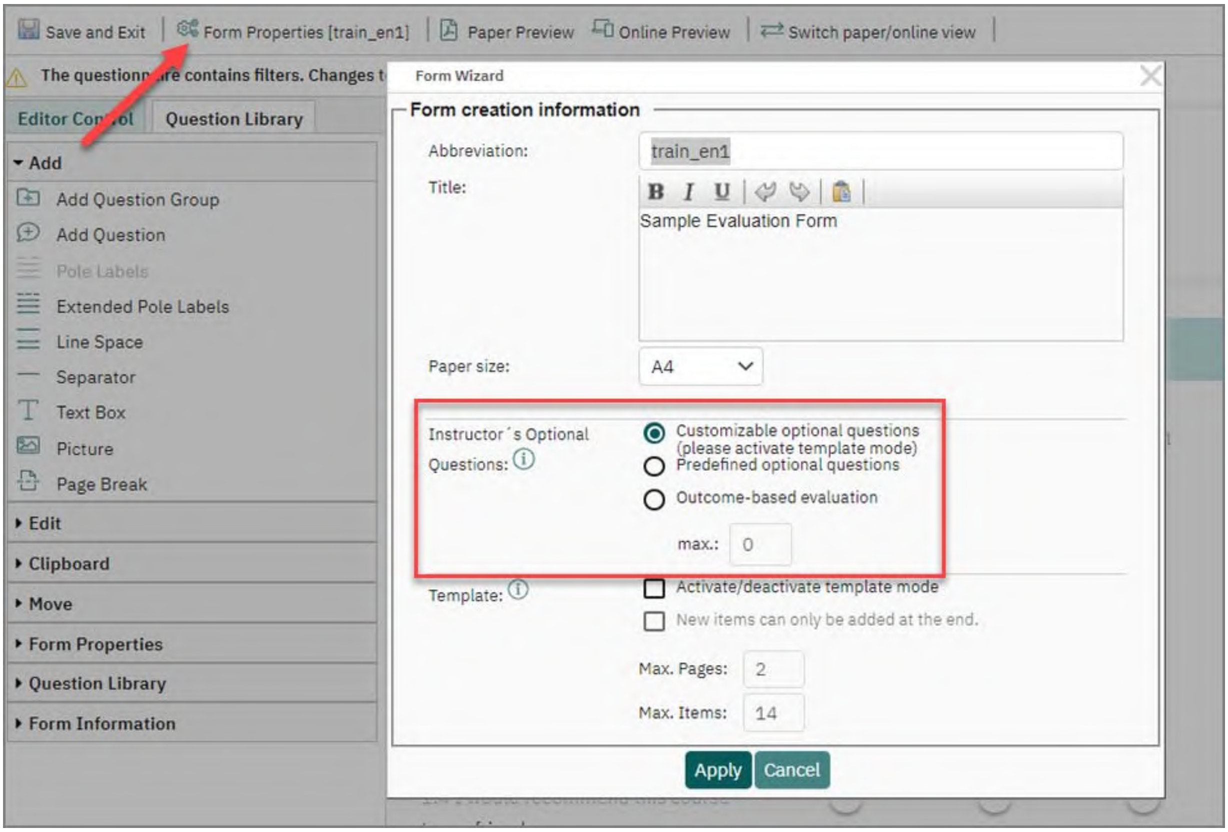


Figure 266: Define type of optional questions

After the questionnaire has been prepared, the instructor's optional questions procedure can be started in the menu “Subunits/Instructor's Optional Questions”. All three procedures are described in the following chapters.

3.20.1. Freely definable optional questions

To allow freely definable optional questions, the corresponding option must be activated in the VividForms Editor.

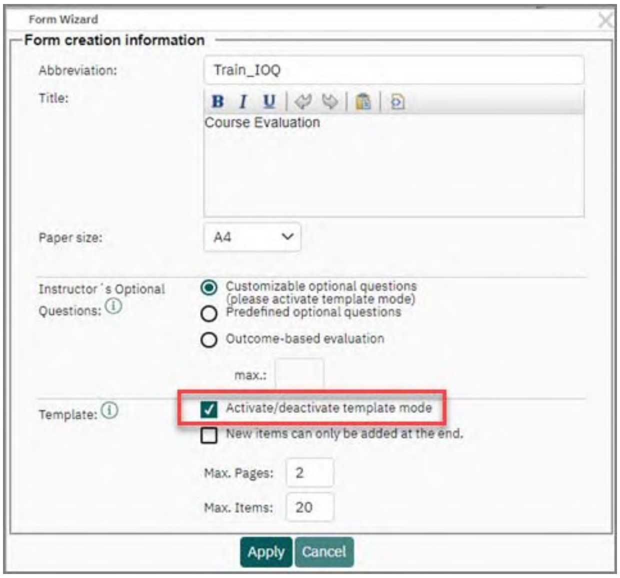


Figure 267: Activate template mode

In case of freely definable questions, you should activate the template mode in the VividForms Editor questionnaire, and set the maximum number of pages and possible elements, whereby every item that can be selected is an element, e.g. question groups, question, image, and also line spaces or separators. You can also set that an instructor is only allowed to add new elements at the end. If these options are not activated, the instructor can expand the questionnaire of the instructor's optional questions at any place, with as many elements as desired.

The template mode is activated in the form wizard. The Administrator should activate it only after completion of the questionnaire, because only after completion can any meaningful limitations be imposed on the elements and pages that can be added.

Activate Instructor's optional questions

When the questionnaire has been prepared, the surveys can be generated using the “Generate surveys” menu. There are no special steps or settings necessary.

In the next step, “Instructor's optional questions” can be activated. To do this, open the menu “Subunits/Instructor's optional questions” and enable the option “Activate” for “Freely definable optional questions”. Use the lists to select the desired courses. Please note, that only those courses are displayed for which you have generated a survey in advance.

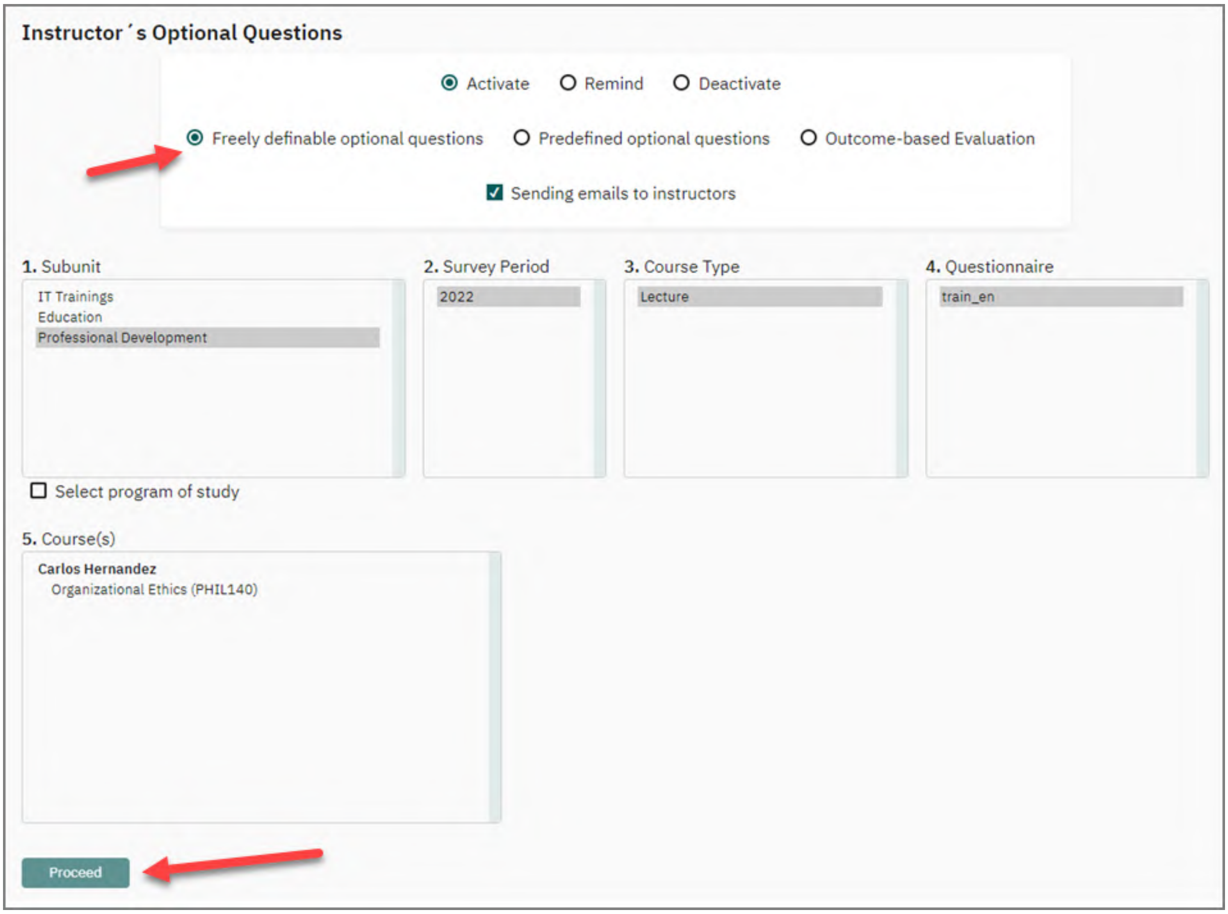


Figure 268: Activate freely definable optional questions

If the option “Sending emails to instructors” is activated, the corresponding instructor receives an email invitation with a link to open the “Instructor's optional questions”.

Example:

Such an email could read as follows:

Dear Mr. Example,

The Instructor’s Optional Questions has been activated for you. You can enter questions for the survey or course “Time Management” by clicking on the link given below. Alternatively you can copy the complete link and enter it into the address line of your Internet browser.

Link:http://localhost/evasys/mask.php?mode=show&tan=C7XES

Your evasys Administrator

In the column “Status” in the survey list the administrator can see that instructor's optional questions have been activated. If you click on the status, you can view and add instructors optional questions yourself.

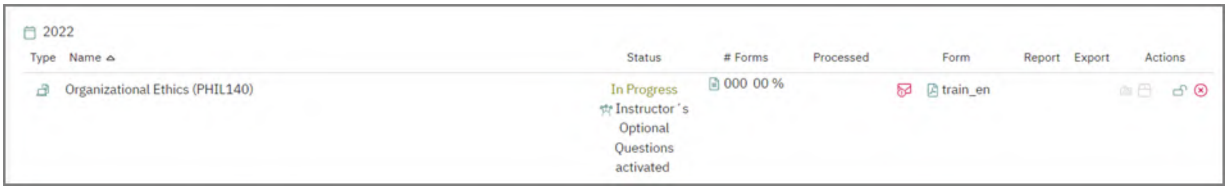


Figure 269: Activated Instructor's Optional Questions in the survey list

As soon as the instructor or project manager opens the page via the link, s/he can check and correct the course data.

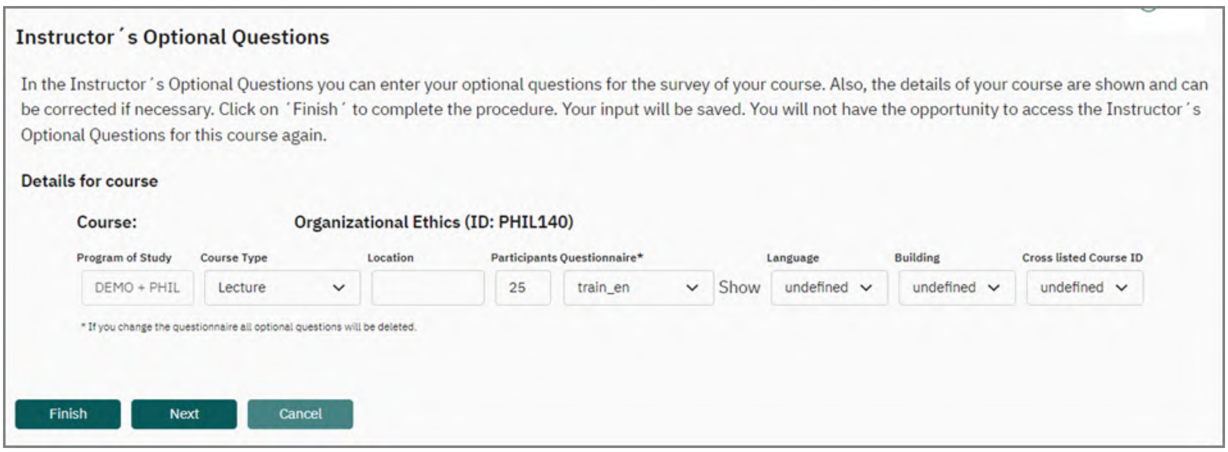


Figure 270: Check course data

The instructor can use a drop-down menu to define whether the course has taken place and shall be evaluated. If it has not taken place, s/he can select a reason for this and click [Finish]. The reasons can be defined beforehand in the menu “System Settings/evasys Settings/Survey/Instructors Optional Questions/IOQ: reasons for not conducting a survey”.

The administrator can automatically be informed, if a course cannot be evaluated (“System Settings/evasys Settings/Survey/Instructors Optional Questions/IOQ: Email to the administrator when survey canceled”).

If allowed, the course data can be adapted. This option can be activated or deactivated under “System Settings/evasys Settings/Survey/Instructors Optional Questions/IOQ: modify course data”).

If the course takes place, the user can click [Next] to access the questionnaire. The VividForms Editor opens. Depending on how the template mode has been defined, the user can now add individual questions and elements.

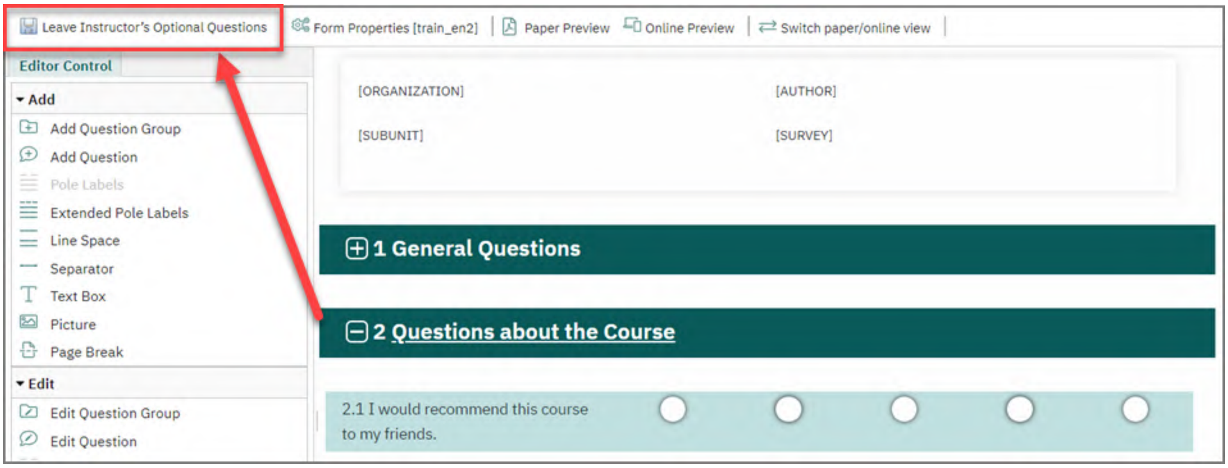


Figure 271: Add freely definable optional questions

The questionnaire must be edited in one session. After the user clicks on “Leave Instructor's Optional Questions” the changes are applied and the Instructor's optional questions cannot be accessed by the instructor a second time.

Depending on the setting, the questionnaires are now sent directly to the instructors or to a group address. If no automatic dispatch is activated, the administrator can now open and print the questionnaires.

Remind and Deactivate Instructor's Optional Questions

Via the menu “Subunits/Instructor's Optional Questions” the instructors can be reminded that they are invited to add individual questions. They receive an email which again contains the link to the Instructor's Optional Questions site.

With the help of the function “Deactivate” the Instructor's Optional Questions can be deactivated for one or more courses at a time, so that instructors are no longer able to access the site. If desired, automatic email notification of the instructors can be disabled.

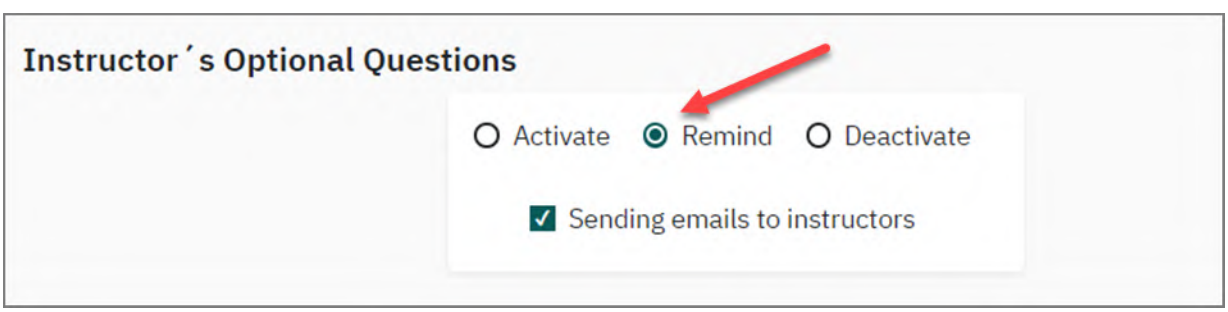


Figure 272: Remind or deactivate instructors optional questions

The text of the relevant emails can be edited in the menu System Settings/Text Templates (“E-MAIL: Instructor's Optional Questions activated”, “EMAIL: Instructor's Optional Questions reminder” and “E-MAIL: Instructor's Optional Questions deactivated”). The administrator can edit the surveys where the Instructor's Optional Questions are activated by opening the list of surveys (main menu “Subunits”, there “Display Surveys”).

3.20.2. Predefined Optional Questions

To allow predefined optional questions, activate the corresponding procedure in the questionnaire settings. The template mode should not be activated.

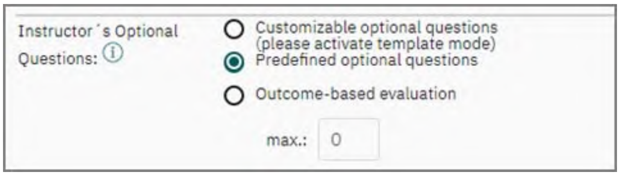


Figure 273: Activate predefined optional questions

Now add optional questions at the desired positions on the questionnaire. To do this, click on the position below which you want to add the optional question and then click “Add question” in the Editor control. You can only use scaled questions or open questions as optional questions. Select one of the two types and click [Next].

In the “Settings” section you can now activate the option “Use this question as predefined optional question”.

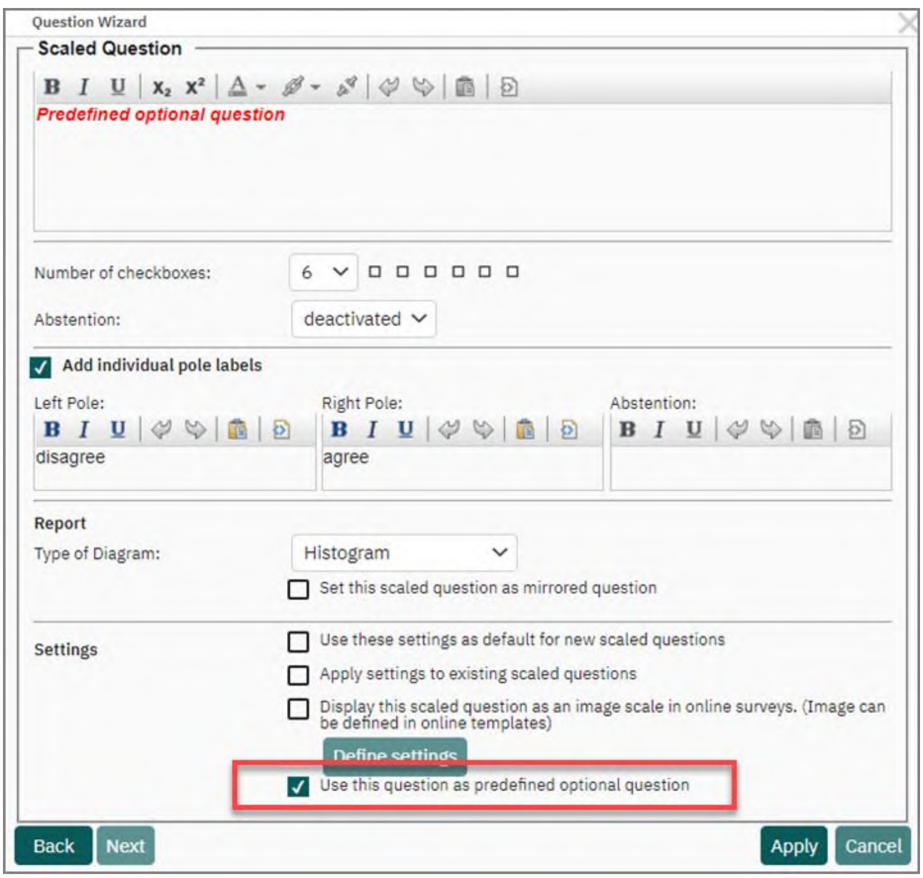


Figure 274: Create predefined optional question

The placeholder text “Predefined optional question” is now automatically shown as question text. This can be overridden later on by the instructors. Now you can do all other necessary settings and click [Apply] to add the question to the form. This way, you can add all desired questions to the questionnaire. In the example below you see a questionnaire with a predefined scaled question and open question.

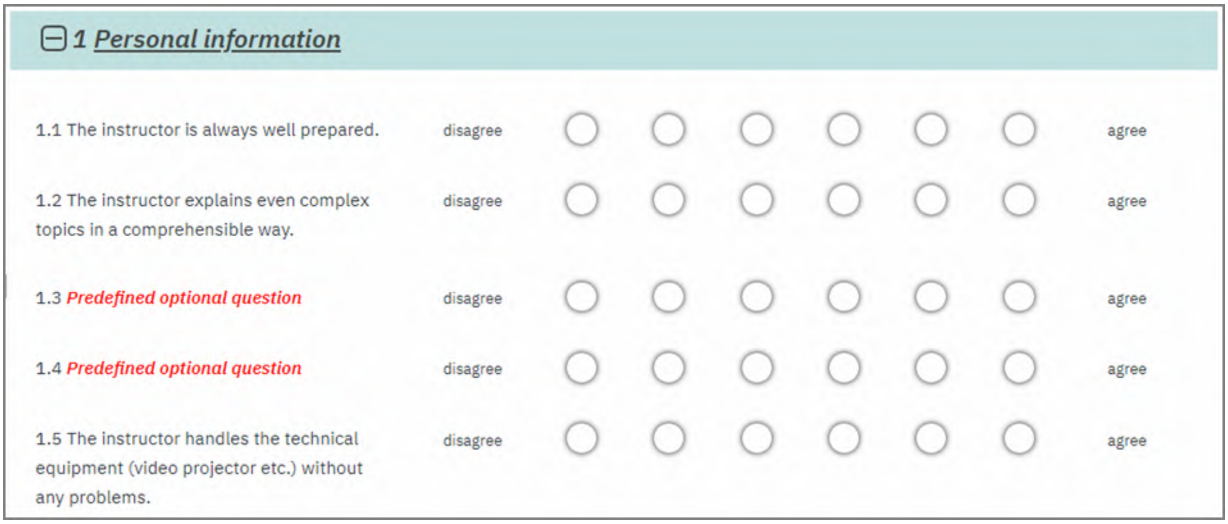


Figure 275: Predefined optional questions on the questionnaire

You can also prepare your question library for the use of optional questions. For this you can add questions to the question library that can later be added by the instructor.

Open the menu "Questionnaire/Question Library" and select the folder "Instructor's Optional Questions: Predefined Optional questions". The "New Question" icon allows you to create new questions.

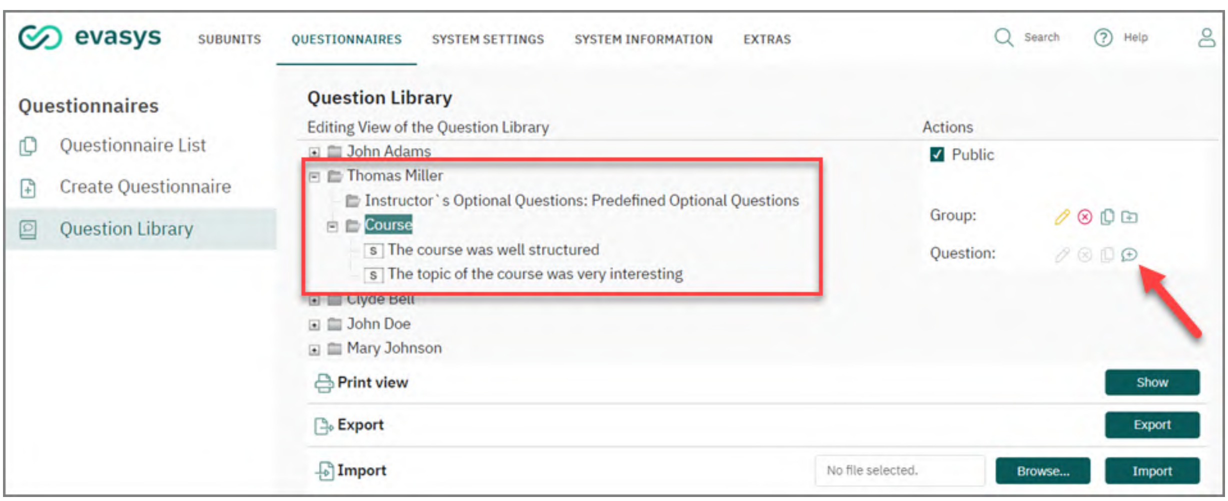


Figure 276: Define Predefined Optional Questions in the Question Library

In the main menu "System Settings" under „General/Survey/Instructor's Optional Questions" you can give access to the predefined optional questions in the library, as well for the Subunit Administrator. Within the folder, a free folder structure can be created. However, the folder itself cannot be copied, renamed or deleted. Merely setting the "public" status is possible.

Please note that the library is user-specific. This means that the instructor later only sees the questions from the question library of the user who generated the survey. For information regarding the use of the question library, see chapter B 2.3.6. “Question Library”.

Activate Instructor's Optional Questions

When the questionnaire has been prepared, the surveys can be generated using the “Generate surveys” menu. There are no special steps or settings necessary.

In the next step, “Instructor's optional questions” can be activated. To do this, open the menu “Subunits/Instructor's optional questions” and enable the option “Activate” for “Predefined Optional Questions Mode”. Use the lists to select the desired courses. Please note, that only those courses are displayed for which you have generated a survey in advance.

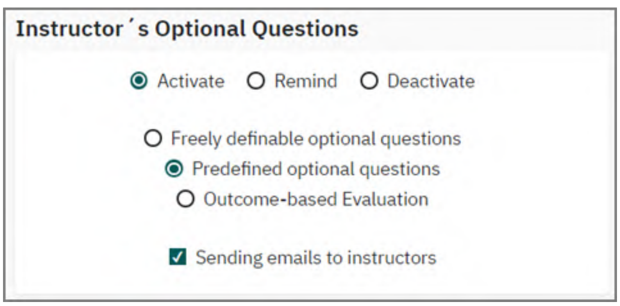


Figure 277: Activate Instructor's Optional Questions for predefined optional questions

If the option “Sending emails to instructors” is activated, the corresponding instructor receives an email invitation with a link to open the “Instructor's optional questions”.

After clicking on the link, a website opens in the internet browser. In the upper part of the window the course data can be checked. If the course has not taken place, the reasons can be defined. In the lower part of the window, the user can add predefined optional questions. To do this, the checkbox in front of the question has to be enabled. The question text and texts for the pole labels (in case of scaled questions with individual pole labels) can be entered in the corresponding text boxes.

The instructor can select questions from the question library or add his own. Clicking [question assume] inserts the selected question in the question box.

Note:
The question in the library must fit exactly to the applied optional question on the questionnaire. Which means the number of options, type of pole label, etc. Within scale questions the number of lines from the open questions must be identical. Otherwise the question will not be displayed for selection

By clicking [Finish] the changes will be applied and the window will be closed. The instructor's optional questions menu cannot be opened and edited a second time.

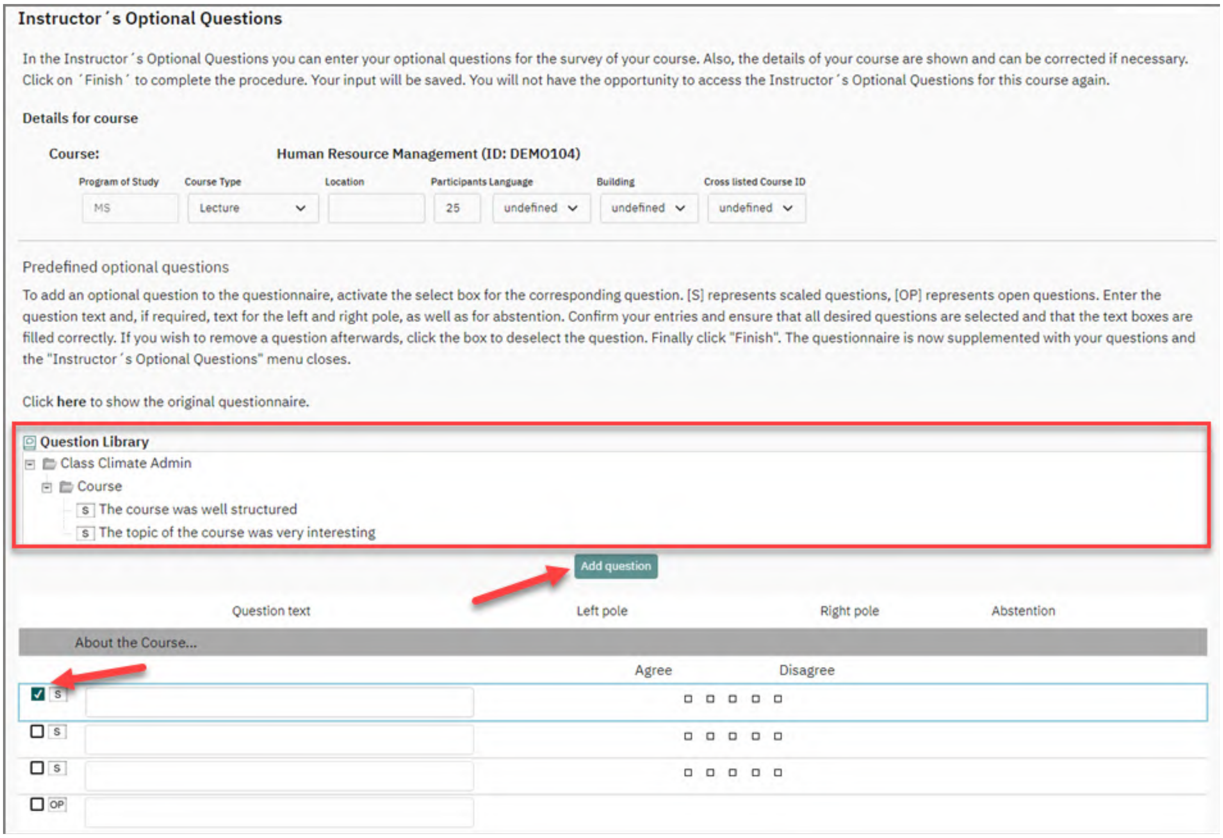


Figure 278: Instructor's optional question entry mask

The optional questions are now added to questionnaire automatically.

You can activate/deactivate the questionnaires for your instructors. In the menu "Settings" under "System Settings/Survey/Instructor's Optional Questions" you can choose the rights your instructor should get. If s/he is allowed to choose questions from the library only (option 1) or if s/he is also allowed to add his own (option 2). Option 0 deactivates the question library for your instructors.

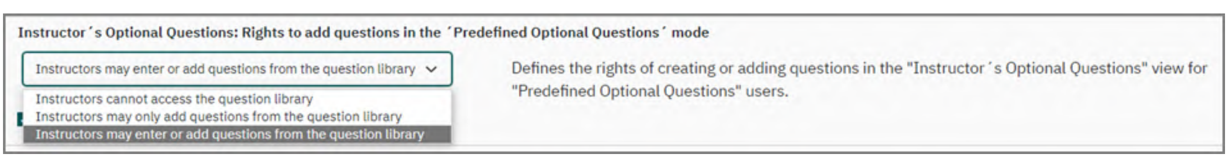


Figure 279: Configure Predefined Optional Questions in the Question Library via System Settings

Depending on the setting, the questionnaires are now sent directly to the instructors or to a group address. If no automatic dispatch is activated, the administrator can now open and print the questionnaires.

Remind and Deactivate Instructor's Optional Questions

Via the menu “Subunits/Instructor's Optional Questions” the instructors can be reminded that they are invited to add individual questions. They receive an email which again contains the link to the Instructor's Optional Questions site.

With the help of the function “Deactivate” the Instructor's Optional Questions can be deactivated for one or more courses at a time, so that instructors are no longer able to access the site. If desired, automatic email notification of the instructors can be disabled.

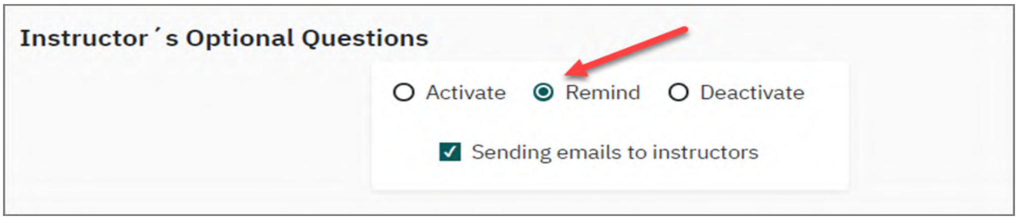


Figure 280: Remind or deactivate instructors optional questions

The text of the relevant emails can be edited in the menu System Settings/Text Templates (“E-MAIL: Instructor's Optional Questions activated”, “EMAIL: Instructor's Optional Questions reminder” and “E-MAIL: Instructor's Optional Questions deactivated”). The administrator can edit the surveys where the Instructor's Optional Questions are activated by opening the list of surveys (main menu “Subunits”, there “Display Surveys”).

3.20.3. Outcome-based Evaluation

One purpose of evaluations in higher education is to critically appraise teaching quality in modules, courses or even entire programs. In addition to providing formative or summative feedback to individual teachers and/or teaching coordinators, the ultimate goal of this process is to improve teaching quality.

evasys allows you to use the Instructor's optional questions feature to integrate outcome-based evaluations into your centralized course evaluation. This type of evaluation is based on a novel evaluation tool using repeated student self-assessments to measure performance gain ('comparative self-assessment', CSA). The tool was developed by Prof. Dr. Tobias Raupach at Göttingen University Medical Centre, Germany.

The questionnaire used for standard course evaluation can be enlarged by individual learning objectives which can be either created by the instructors themselves or taken from a library. After the survey has been carried out, the evasys PDF report contains a special analysis of the percentage performance gain for each learning objective.

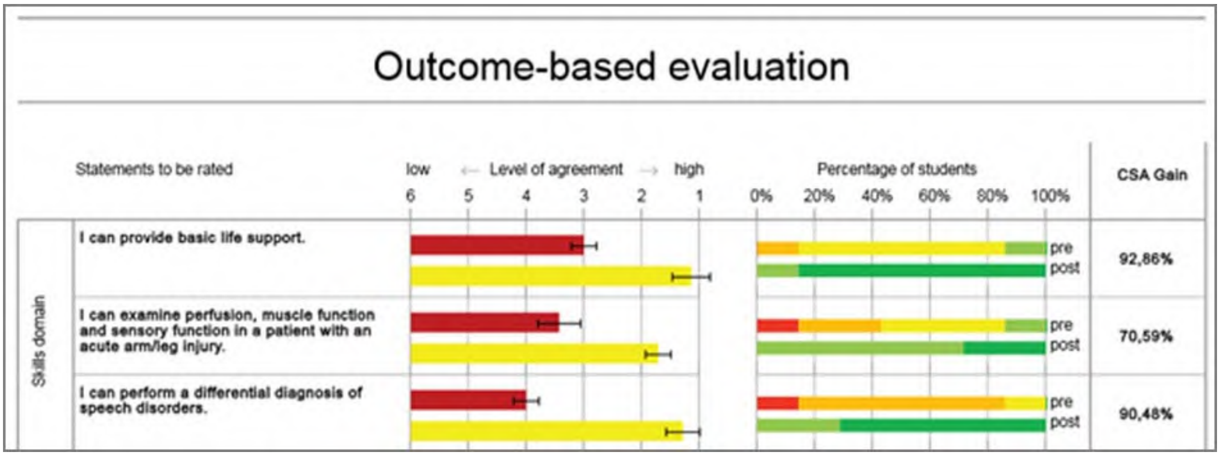


Figure 281: Sample report for outcome-based evaluation

For further information on the procedure compare the “User manual for the CSA gain evaluation” by Prof. Dr. Tobias Raupach and Sarah Schiekirka, which can be downloaded in the Extras section.

Prepare Questionnaire

To allow instructors to add individual learning objectives to the questionnaire, activate the option “Outcome-based evaluation” in the Form Properties wizard and define the maximum number of allowed learning objectives. The template mode should not be activated.

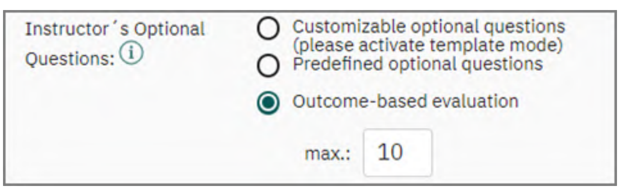


Figure 282: Allow outcome-based evaluation

In general, no further settings must be done for the questionnaire. The learning objectives which will be later on added by the instructors will be automatically displayed at the end of the questionnaire in separate question groups.

However, we recommend adding a short explanatory text at the end of the questionnaire with some notes on how to answer the questions correctly. This cannot be done via the Instructor's optional question entry mask.

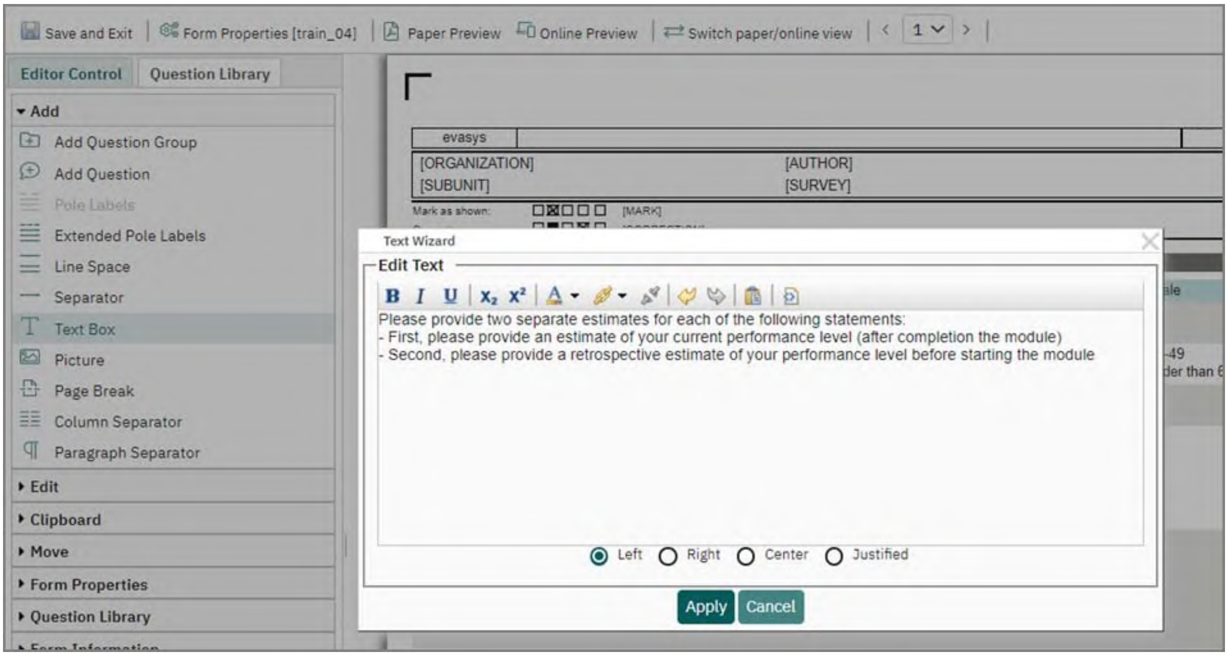


Figure 283: Explanatory text on the questionnaire

Provide learning objectives

Via the evasys question library (menu Questionnaires/Question library) you can provide your instructors with a catalog of learning objectives they can use for their outcome-based evaluation. For learning objectives, a separate question type “Learning Objective Question Set” is available. The learning objectives can be either created manually before the survey takes place or can be imported with the help of a CSV file. For further information on using the question library compare chapter B 2.3.6. “Question Library”.

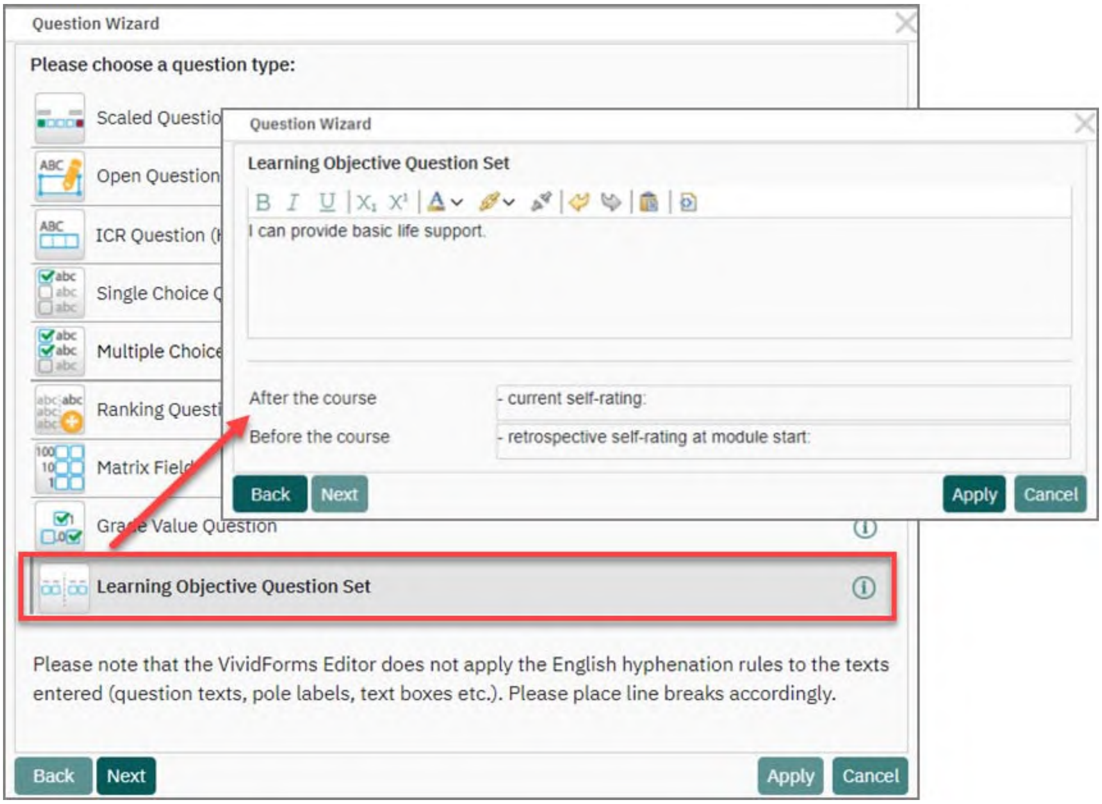


Figure 284: Create learning objectives in the question library

Activate Instructors Optional Questions

When the questionnaire has been prepared, the surveys can be generated using the “Generate surveys” menu. There are no special steps or settings necessary.

In the next step, “Instructor's optional questions” can be activated. To do this, open the menu “Subunits/Instructor's optional questions” and enable the option “Activate” for “Outcome-based Evaluation”. Use the lists to select the desired courses. Please note, that only those courses are displayed for which you have generated a survey in advance.

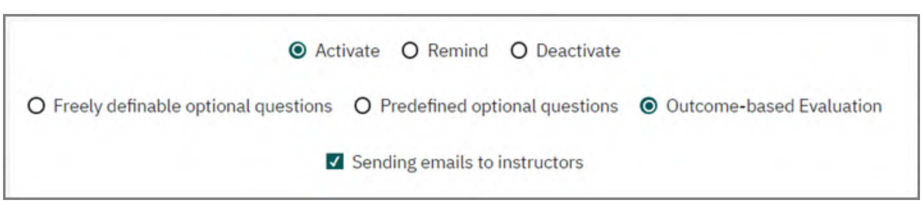


Figure 285: Activate Instructor's Optional Questions for Outcome-based evaluation

If the option “Sending emails to instructors” is activated, the corresponding instructor receives an email invitation with a link to open the “Instructor's optional questions”.

After clicking on the link, a website opens in the internet browser. In the upper part of the window the course data can be checked. If the course has not taken place, the reasons can be defined. In the lower part of the window, the user can add learning objectives.

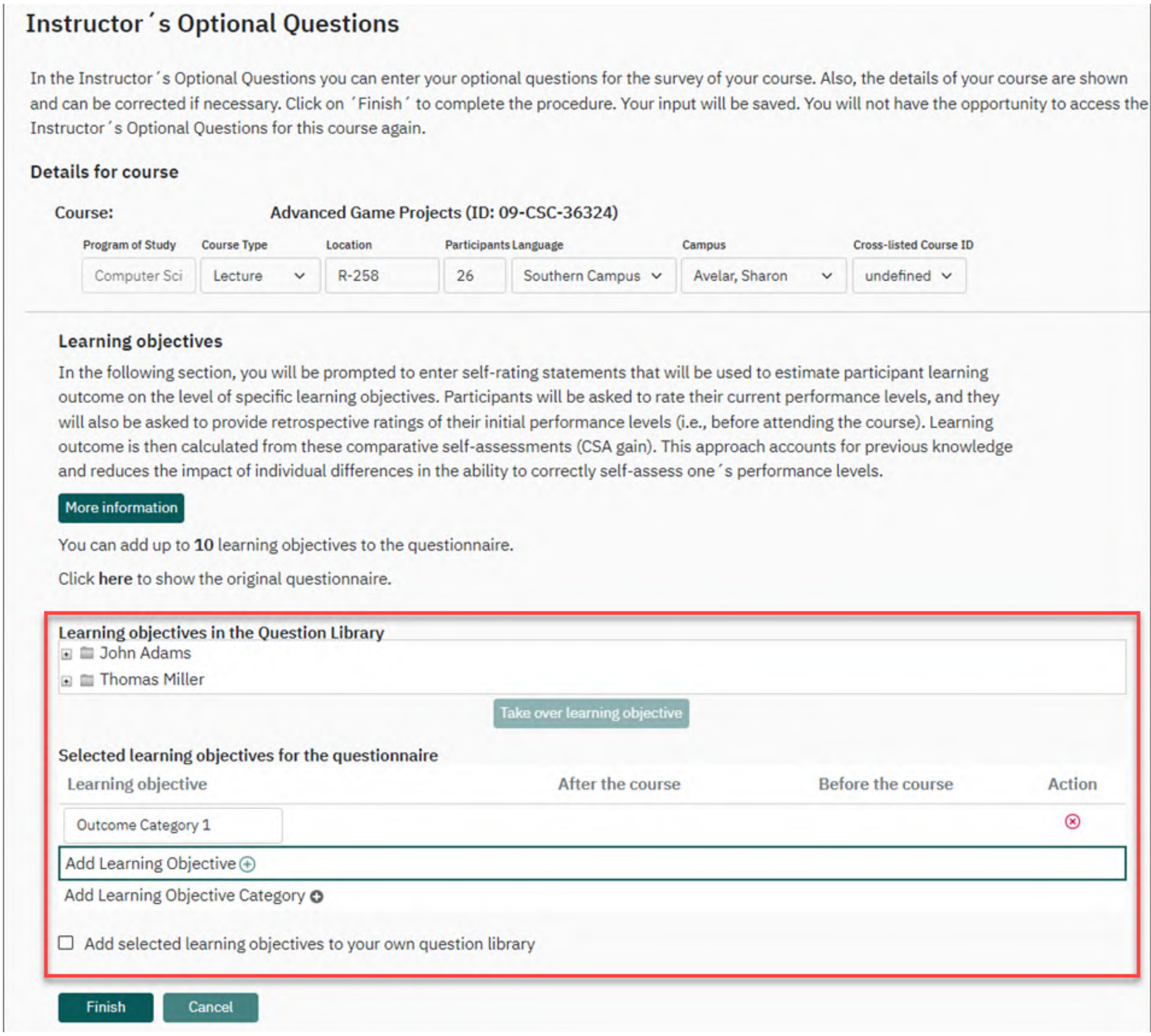


Figure 286: Instructor's Optional Questions entry mask for learning objectives

Depending on the configuration, instructors may either only select learning objectives from the library provided by the administrator, or may enter their own learning objectives and add them to their own personal library. By default, instructors are allowed to enter their own learning objectives. However, this function can be deactivated in the menu “System Settings/evasys Settings/Survey/Instructor's Optional Questions/Allow instructors to create their own learning objectives for outcome-based evaluation”. Via the button [More information] users can view detailed instructions on how to enter and phrase learning objectives.

In the first step, click the plus-icon next to “Add Learning Objective Category” to add a category, i.e. a question group, to the form. Enter the name of the learning objective category in the text box. Then click the plus-icon next to “Add Learning Objective” to add a learning objective. Enter the text in the text box.

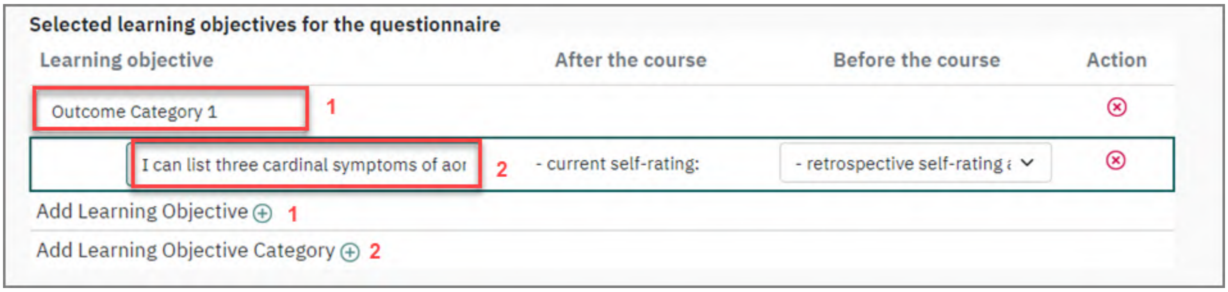


Figure 287: Adding a learning objective manually

Instead of adding the learning objectives manually, you can also select a learning objective from the library by double-clicking or clicking the button [Take over learning objective].

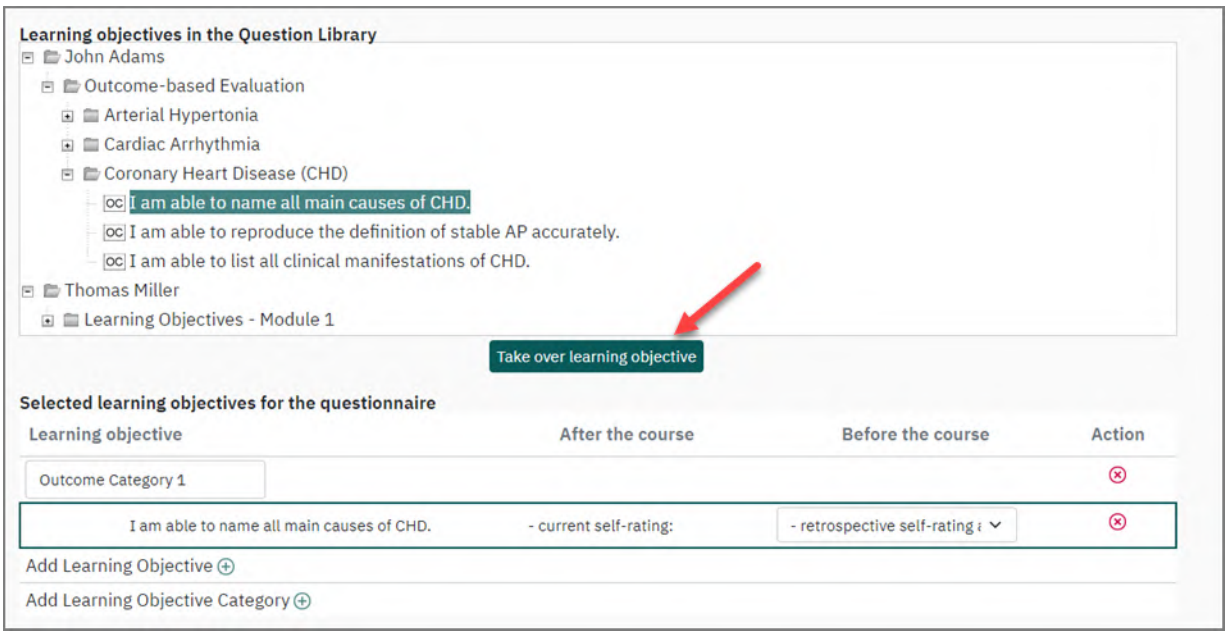


Figure 288: Taking a learning objective from the library

Learning objectives or categories can be removed by clicking the red cross symbol. The text of the learning objective and the text for the type of self-rating (current self-rating vs. retrospective self-rating) can only be adapted if users have the right to create their own learning objectives (see above).

If desired, users can take over learning objectives into their own question library, so they can re-use them in future outcome-based evaluations. To do this, one or more questions can be selected by pressing CTRL during mouse-click. A blue frame marks the selection. Additionally, the option “Add selected learning objectives to your own question library” must be activated.

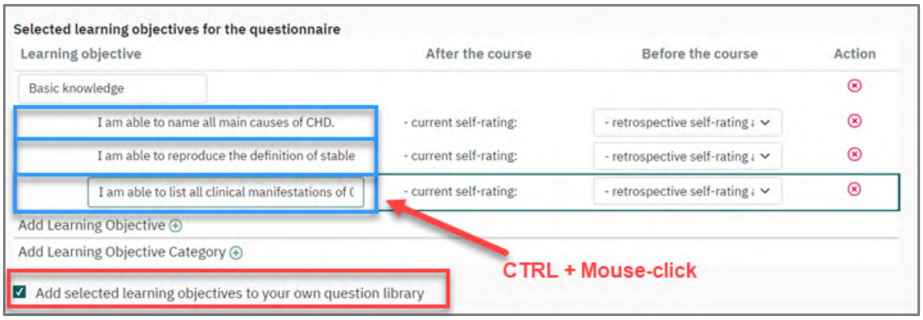


Figure 289: Take over learning objectives into personal library

When all learning objectives have been added, the Instructor's Optional Questions page can be closed by clicking the button [Finish]. Please note, that the user will not be able to open and edit the optional questions a second time.

The questionnaire is now automatically enlarged by the learning objectives. The self-assessments are designed according to the following principle:

- Question Text as a text box (Please note, that for the report you should activate the display of text boxes; see chapter B 4.7.6. “General Settings”)
- Left column: Scaled question for current self-assessment (Performance after the course)
- Right column: Scaled question for retrospective self-assessment (Performance before the course)

The scaled questions have 6 answer options. The left pole is positive (fully agree), the right pole is negative (completely disagree). Please note, that the questionnaire may not be mirrored, as otherwise the analysis will not be correct.

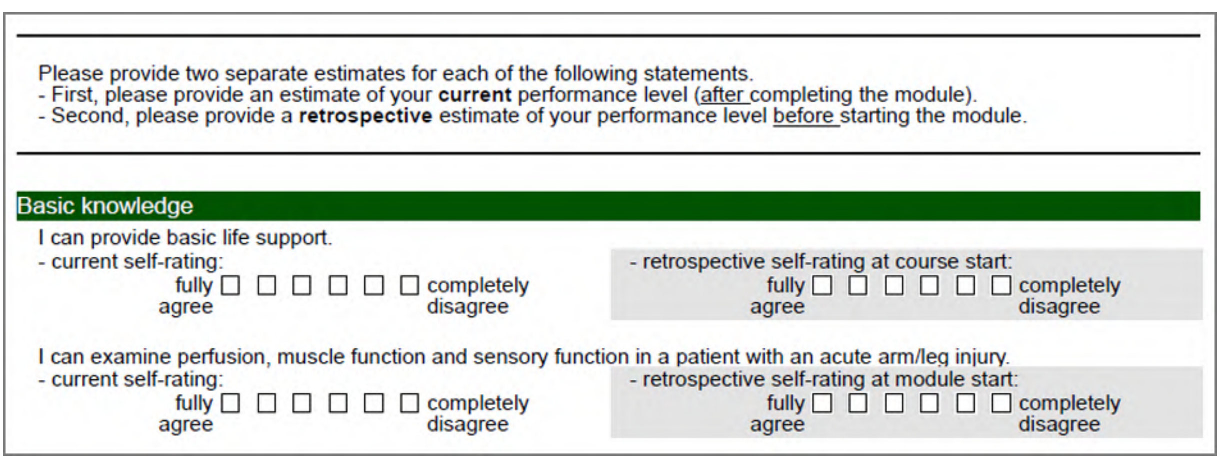


Figure 290: Questionnaire with learning outcomes

Depending on the setting, the questionnaires are now sent directly to the instructors or to a group address. If no automatic dispatch is activated, the administrator can now open and print the questionnaires.

Remind and Deactivate Instructor's Optional Questions

Via the menu “Subunits/Instructor's Optional Questions” the instructors can be reminded that they are invited to add individual questions. They receive an email which again contains the link to the Instructor's Optional Questions site.

With the help of the function “Deactivate” the Instructor's Optional Questions can be deactivated for one or more courses at a time, so that instructors are no longer able to access the site. If desired, automatic email notification of the instructors can be disabled.

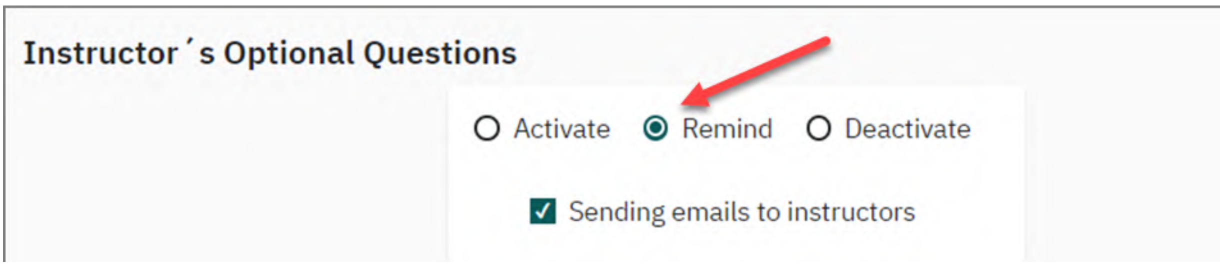


Figure 291: Remind or deactivate instructors optional questions

The text of the relevant emails can be edited in the menu System Settings/Text Templates (“E-MAIL: Instructor's Optional Questions activated”, “EMAIL: Instructor's Optional Questions reminder” and “E-MAIL: Instructor's Optional Questions deactivated”). The administrator can edit the surveys where the Instructor's Optional Questions are activated by opening the list of surveys (main menu “Subunits”, there “Display Surveys”).

Analysis in the PDF Report

The PDF report of the survey contains a specific analysis of the learning outcome. The analysis is shown a the end of the report, after the profile line.

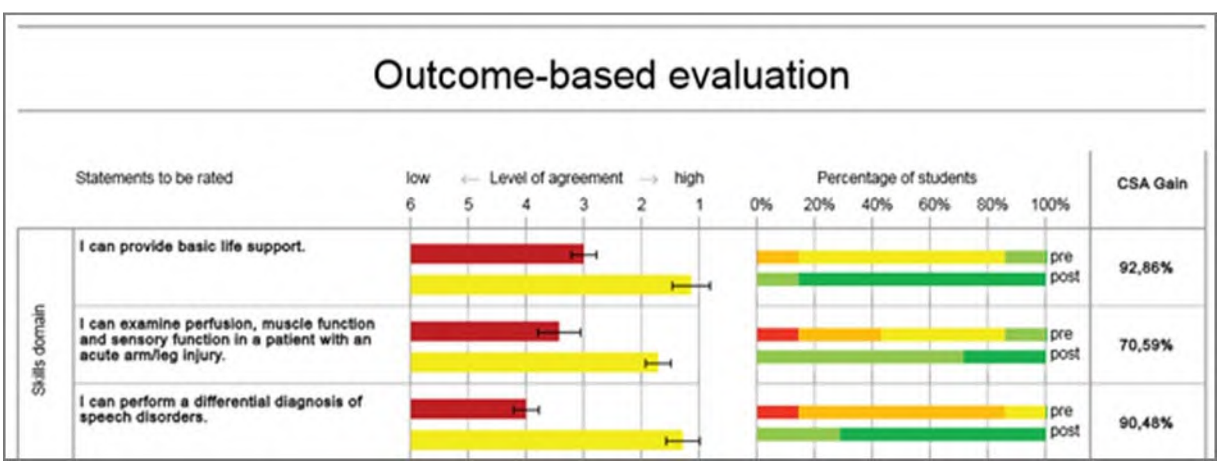


Figure 292: Outcome-based evaluation - Analysis in the PDF report

The mean level of agreement across the entire student cohort is given on the left-hand side of the figure. More favorable mean self-ratings are displayed as longer bars. Student self-ratings broken down by scale options are displayed on the right.

Red bars indicate low levels of agreement while green bars indicate high levels of agreement. CSA gain is given in the final column. This does not reflect the percent change in the mean self-ratings, but an estimate of student learning outcome adjusted for initial performance levels. Please refer to the user manual for a detailed description of the calculations underlying these values.

Note:
The design of the questionnaire and the outcome report differ in that the most favorable scale option is displayed on the left in the questionnaire whereas in the report PDF, more favorable ratings are displayed on the right-hand side.

Data Transmission for Research Purposes

To support research on CSA gain, users are kindly asked to share their data with Prof. Dr. Raupach's team for further analysis. All analyses will be done in an anonymized dataset.

- To allow further analysis, the following information and data has to be transferred:
- The raw data in CSV format (can be retrieved in the survey list or via the menu “Data Export”
- The questionnaire in PDF format
- The following survey information:
    - Type of university
    - Area of higher education (e.g. mathematics)
    - Name of the program (including degree)
    - Student level (or study year)
    - If you want to receive feedback, please also include your contact details

Please send the data to the following address:

ausbildungsstudie@med.uni-goettingen.de

3.20.4. Settings for Instructor's Optional Questions

In the system settings (menu System Settings/evasys Settings/Survey) there is a configuration menu for Instructor's Optional Questions (see below chapter D 2.5.3. “Survey”). The following options are available:

IOQ: activation status (Sub)

If this option is deactivated, the complete function is switched off and cannot be used in the system.

IOQ: modify course data (Sub)

If activated, instructors are allowed to edit the course data displayed in the upper part of the Instructor's Optional Questions site. If deactivated, information is displayed, but cannot be edited.

IOQ: question library (Sub)

If activated, instructors can use the question library in the VividForms Editor when adding freely definable optional questions.

IOQ: direct delivery of questionnaire/PSWDs (Sub)

If activated, after completing the Instructor's Optional Questions an email with the questionnaire or PSWDs is sent to the instructors. If this function is deactivated, all emails will be sent to the group address defined in the “Email Functions & Accounts” section.

IOQ: email for deactivation contains PSWD list (Sub)

When deactivating the Instructor's Optional Questions a PDF with the PSWDs can be sent to the instructors.

IOQ: Status change (Sub)

If activated, the status of the Instructor's Optional Questions in the survey overview changes to “completed” as soon as the VividForms Editor is opened in the Instructor's Optional Questions. If deactivated, the status changes only after the save and exit button in the Instructor's Optional Questions is clicked.

IOQ: reasons for not conducting a survey (Sub)

Here you can predefine reasons why a survey may not be conducted. These reasons can be selected by the instructor when filling in the Instructor's Optional Questions. Please note that the single entries have to be separated using the pipe character (|).

IOQ: Email to the instructor when survey canceled (Sub)

When the instructor has defined that the survey shall not take place, an email is sent to the administrator.

IOQ: Allow instructors to create their own learning objectives for outcome-based evaluation (Sub)

If activated, the users of the instructor's optional questions can define new and edit existing learning objectives in the question library.

3.21. Batch Events

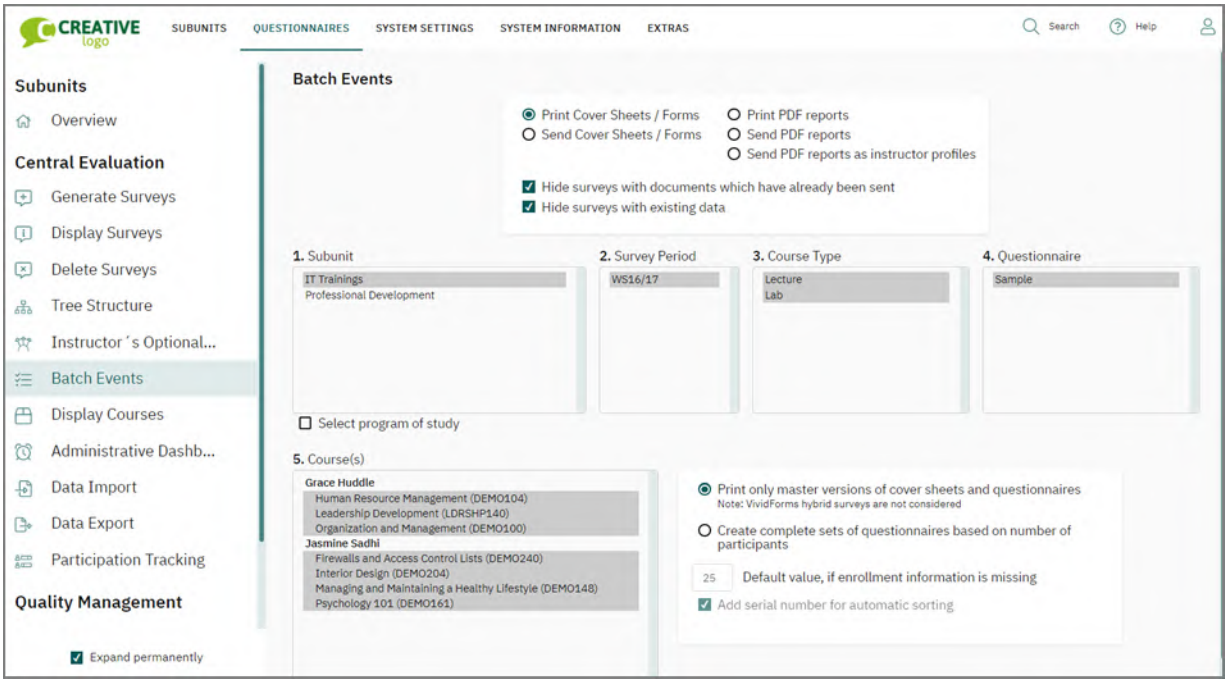


Figure 293: Batch Events

The batch events are located in the menu “Subunits/Batch Events”. They offer various process automation possibilities connected to the distribution of survey forms and survey reports. Please observe that when selecting subunits, survey periods, course types and courses, multiple selections can be made by pressing and holding down the “Ctrl” key.

- Print Cover Sheets/Forms
- Send Cover Sheets/Forms
- Archive PDF Reports and CSV Raw Data
- Send PSWDs to Instructors
- Print PDF Reports
- Send PDF Reports
- Send PDF Reports as Instructor Profiles
- Notes on Languages (English/German)

3.21.1. Print Cover Sheets/Forms

For a selection of surveys the personalized cover sheets or questionnaires will be generated as a single PDF file. It is possible to generate either a master copy or complete sets of questionnaires based on enrollment figures. You can define the maximum number of pages in a batch event under System Settings/evasys Settings/VividForms/Maximum amount of pages that can be printed through batch printing of forms.

The batch printing function enables you to create a large number of personalized cover sheets or questionnaires as PDF files.

Select 1. the subunit, 2. the survey period, 3. the course type, 4. the questionnaire as well as 5. a multiple choice of courses (press Ctrl key).

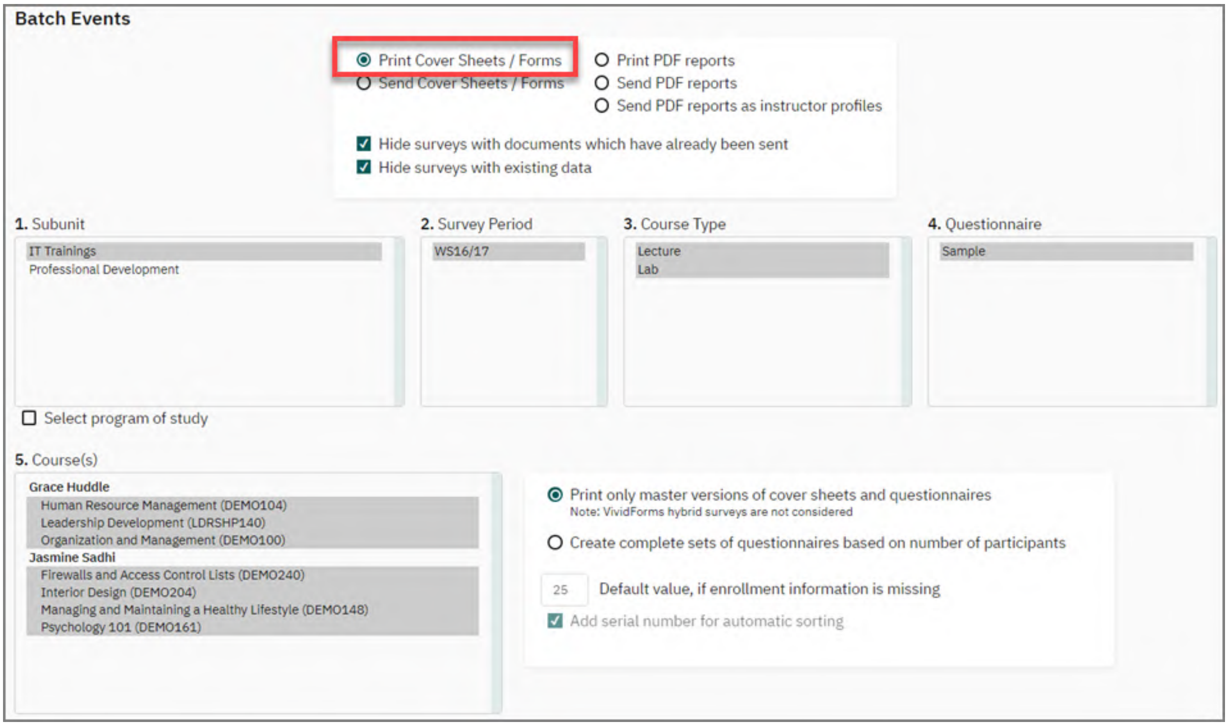


Figure 294: Batch Events: Selecting Courses for Printing Cover Sheets/Forms

Then decide, if you want to request one copy of each cover sheet/questionnaire or if you want to print questionnaires according to enrollment figures, i.e. according to the number of participants assigned to a course.

By default, the PDF document of a cover sheet survey only contains the cover sheet and not the questionnaire. If you want the questionnaire to be produced as well, activate the option “Batch printing: form printing when using the cover sheet procedure” in the menu “System Settings/evasys Settings/Functions”. Please be aware, that this setting is only valid for printing cover sheets and forms and not for sending them.

If you want to print your questionnaires double-sided, you can also activate the option “Batch printing: Duplex printing” in the menu “System Settings/evasys Settings/Functions”. Then the PDF document will contain blank pages which are necessary for double-sided printing (i.e. after a cover sheet or with questionnaires with an odd number of pages).

Surveys in hard copy procedure have the option to include all the questionnaires needed in the PDF document and to number them serially. When each questionnaire has its own number then the consistency of each data set during scanning can be guaranteed. This is especially important when your form has a number of pages. Should the pages get mixed up when scanning a batch then the unique number on each questionnaire will allow them to be correctly sorted.

The number of questionnaires for printing is based on the number of participants. If this information is missing then a default value can be entered into the entry field.

You can now use the batch print feature without needing the serial number (hard copy procedure) if you deactivate the option “Add serial number for automatic sorting”.

This is useful in case you are unable to prevent forms being duplicated during the survey process, and you need to collect all data despite having multiple identical serial number IDs.

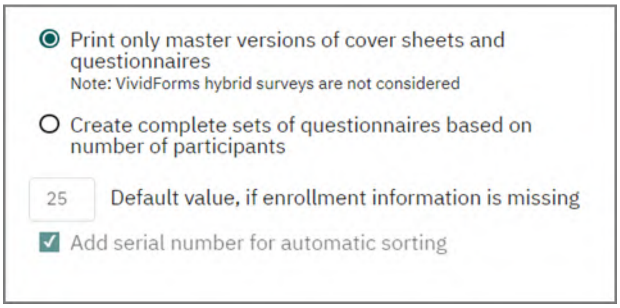


Figure 295: Batch Events: Producing Questionnaires with Page Numbering

Click [Request] to begin the procedure. You will now be redirected to a page displaying an overview of the courses you have selected. Each of the columns in the table show the name of the course, the questionnaire used, the number of questionnaires already printed, the number of participants of the course and the number of questionnaires still to be printed.

The number of copies is equal to the number of participants of the course. If, in an earlier process, questionnaires for a course were created using the batch printing function, this is considered in the number of copies made. The number of copies can be altered retrospectively, so that larger or smaller quantities can be printed. In the footer, the total number of pages to be printed is stated, whereby the page number of the PDF file can be checked.

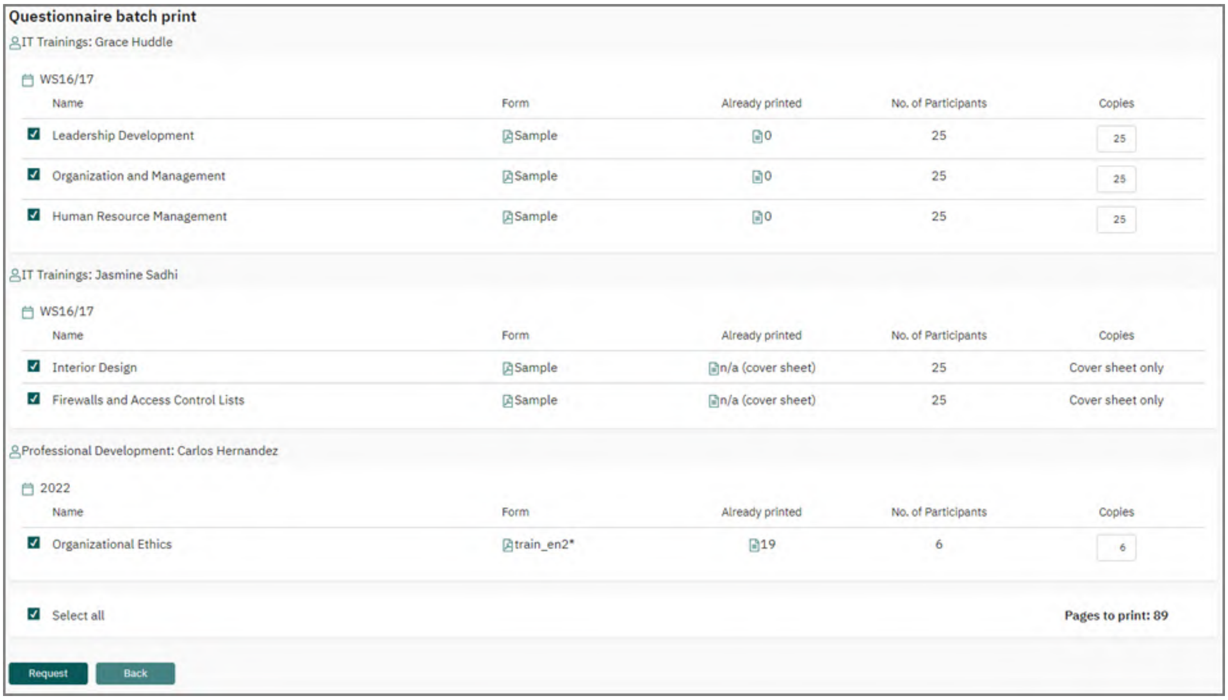


Figure 296: Batch Events: Questionnaire Batch Printing

If necessary, each course can also be retrospectively deselected or later reselected, by activating or deactivating the checkbox in the first column.

To start creating a PDF file, click on the button [Request]. Depending on the number of questionnaires/cover sheets to be created, the processing of the request can take up to several minutes. If you have selected more pages than allowed for in the system settings (cf. “System Settings/evasys Settings/VividForms/Maximum amount of pages that can be printed through batch printing of forms”), a warning appears, requesting that the number of copies to be printed be reduced.

As soon as the PDF file is completed, a download window appears in your browser. Now save the file to your hard disk or open it directly.

To print further pages for the same course, click on the button [Refresh]. The list is refreshed and you can make a new selection.

3.21.2. Send Cover Sheets/Forms

This function emails the personalized cover sheets or questionnaires to the people who are linked to the respective surveys. Both the text of the email message and that of the attached documents can be configured in Settings/Text Templates.

After selecting the batch event, type “Send Cover Sheets/Forms.” The option boxes are completed automatically. Choose a subunit and the corresponding options. In 5. a list of courses which correspond to the selection will be displayed. Only those courses which have survey processes without response data linked to them will appear.

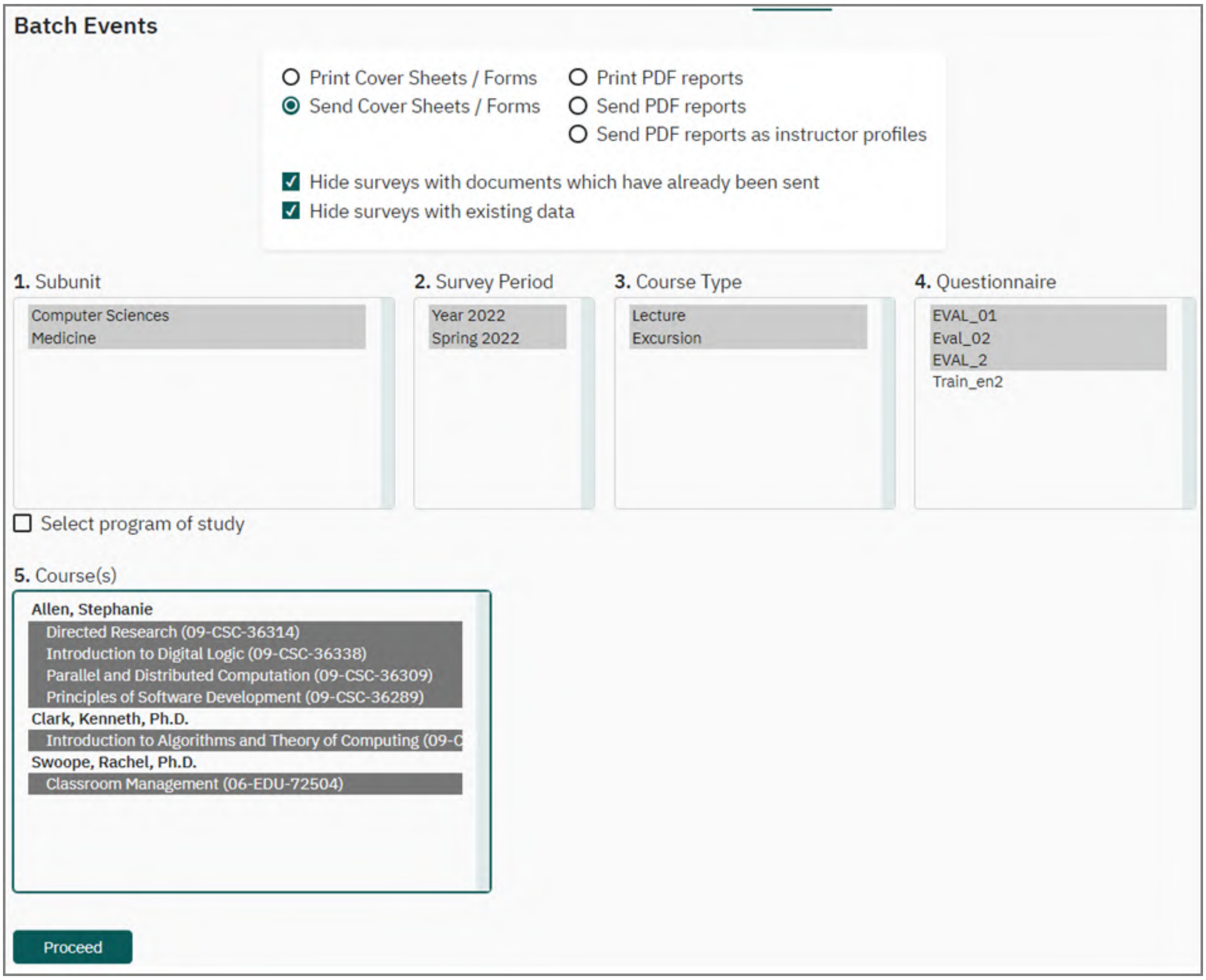


Figure 297: Batch Events: Send Cover Sheets/Forms

Click on [Request] to start batch emailing. A progress bar shows the status of the email submission process.

Figure 298: Batch Events: Email Submission

To abort the email submission click on [Cancel].

After the mailing process is complete the system will show a listing of successful and unsuccessful submissions. All outgoing email will be logged under “Deliveries” in the menu “System Information”.

3.21.3. Archive PDF Reports and CSV Raw Data

Your existing PDF reports and CSV raw data can be archived by sending them to the email address defined in the configuration (“System Settings/evasys Settings/Email Functions & Accounts/Email address of the archive”). In this way, legacy data can be exported with a complete audit trail and subsequently deleted from evasys, increasing and maintaining clarity of the system. During the export, you can determine whether just PDF reports or CSV data, or both, are to be archived.

This option is only available if you have activated the archive function of the batch events in the menu “System Settings/evasys Settings/Email Functions & Accounts/ Archive mailing of PDF reports” and entered a valid email address in the menu “System Settings/evasys Settings/Email Functions & Accounts/Email address of the archive”.

3.21.4. Send PSWDs to Instructors

For online surveys the PDF files containing the PSWD codes can be sent to the survey owners by email. This option is only available if you have selected “Batch events“ in the menu “System Settings/evasys Settings/Email Functions & Accounts/Delivery method PSWDs (central evaluation).

Select the courses which require the PSWD lists to be delivered to the survey owners. The submission will be started by clicking [Request].

3.21.5. Print PDF Reports

For surveys that have been evaluated already, the evaluations can be retrieved and printed for a selection of topics/courses. For this, select as many subunits, survey periods, course/topic types, questionnaires, and courses/topics as you wish.

If you only select one questionnaire, you have the option of selecting the type of report desired via the drop-down menu at “Choose PDF report”. Available here are all the reports for the questionnaires (PDF report configurations, PDF report definitions, PDF report plug-ins). When several questionnaires are selected, you can only retrieve the standard report defined for the respective questionnaire.

The PDF reports can also be created in two different ways:

- The PDF reports of the selected courses are created together in a common PDF file. This is advantageous for example, when the PDF reports for multiple courses are to be printed at the same time.
- The PDF reports requested are summarized as single PDF files in a ZIP file. This is advantageous for example, when the single PDF files are to be passed on in electronic format, deposited in a public folder or, when one wants to print them individually.

Figure 299: Batch Events: Print PDF Report

For each of the PDF reports in the ZIP file it is possible, where necessary, to configure the naming of individual files in advance. In the central system settings (menu “System Settings/evasys Settings/Functions/Batch Events: Naming conventions for PDF Reports in ZIP files”) with the aid of placeholders, a naming convention can be deposited. By default, the following placeholders are used: [SUBUNIT]-[SURNAME]-[FIRSTNAME]-[SURVEYID]-[SURVEY]. You will find a list of all available placeholders in section Batch events: Naming conventions for PDF reports in ZIP files (SUB)

3.21.6. Send PDF Reports

You can determine that an instructor receives all evaluations of his courses accumulated in one email. To do this, please activate the option “Reports of all courses of an instructor collected in one email”. Should this not be the case, the instructor will receive a separate email for each course.

Note:

When sending several reports in an e-mail, please observe the defined maximum number and size for email attachments (“System Settings/evasys Settings/Email Functions & Accounts/Maximum number of attachments” respectively “Maximum size of attachments”).

In the menu “System Settings/Text Templates” the relevant email text can be edited (“E-MAIL: Results of a survey” and “E-MAIL: Results of a survey (Summary)”).

You can select the type of the desired report via the drop-down menu at “Choose PDF report”. If you have only selected one questionnaire, all the reports for the questionnaires (PDF report configurations, PDF report definitions, PDF report plug-ins) are available. When several questionnaires are selected, you can only retrieve the standard report defined for the respective questionnaire.

Alternatively to sending them to the recipients stored at the course/topic, reports can also be sent to one or more of the freely definable email addresses. For this, enter the corresponding email addresses, separated by semi colons, in the entry field.

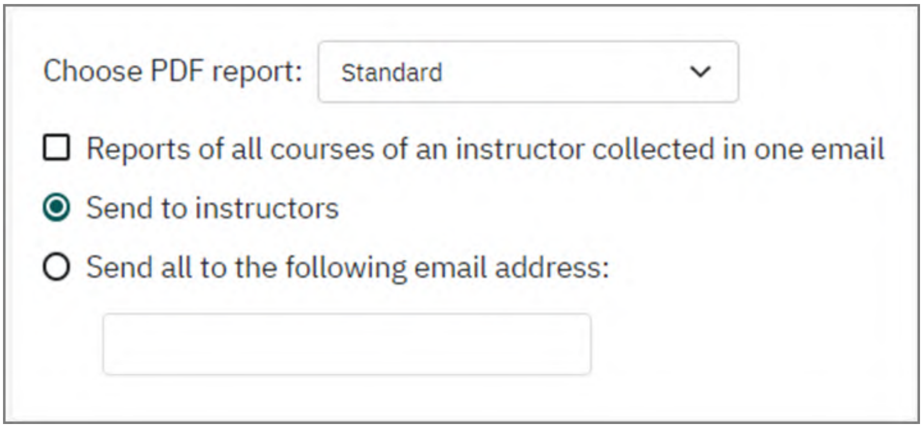


Figure 300: Batch Events: Sending PDF Reports

The file name of the PDF report can be adjusted in advance of sending if necessary. Using placeholders, a convention for the file names can be stored in the central system configuration (“System Settings/evasys Settings/Email Functions & Accounts/ Naming convention for PDF reports in emails” menu). The following placeholders are used by default: [PERIOD]-[SURVEY], i.e. name of the period and survey name, e.g. “WS15/16-Introduction_into_new_economy”. There is a list of all available placeholders in section Naming conventions for PDF reports in emails (SUB).

3.21.7. Send PDF Reports as Instructor Profiles

You can send your instructor profile for surveys that have already been evaluated as a batch email.

All available surveys of an instructor will be merged to a summarized report (profile). You can only select one questionnaire.

By activating the option „Include courses with secondary instructors in instructor profiles”, courses with additional report recipients are also included.

Use the “Choose PDF report” menu to select, which type of report shall be used for the instructor profile (e.g. PDF report definitions or plug-ins).

You can determine whether or not the answers to open questions are to be included in your instructor profile. To do this, please activate the option “Include answers to open questions”.

If the respective instructor, in addition to his profile, is to receive a detailed report for each of his courses, simply activate the option “Also send single PDF reports”.

Furthermore, you can determine whether profiles and PDF reports are sent solely to the respective instructor (“Send to instructors”) or only to a specified email address (“Send all to the following email address”). Multiple recipient addresses are separated by semicolons.

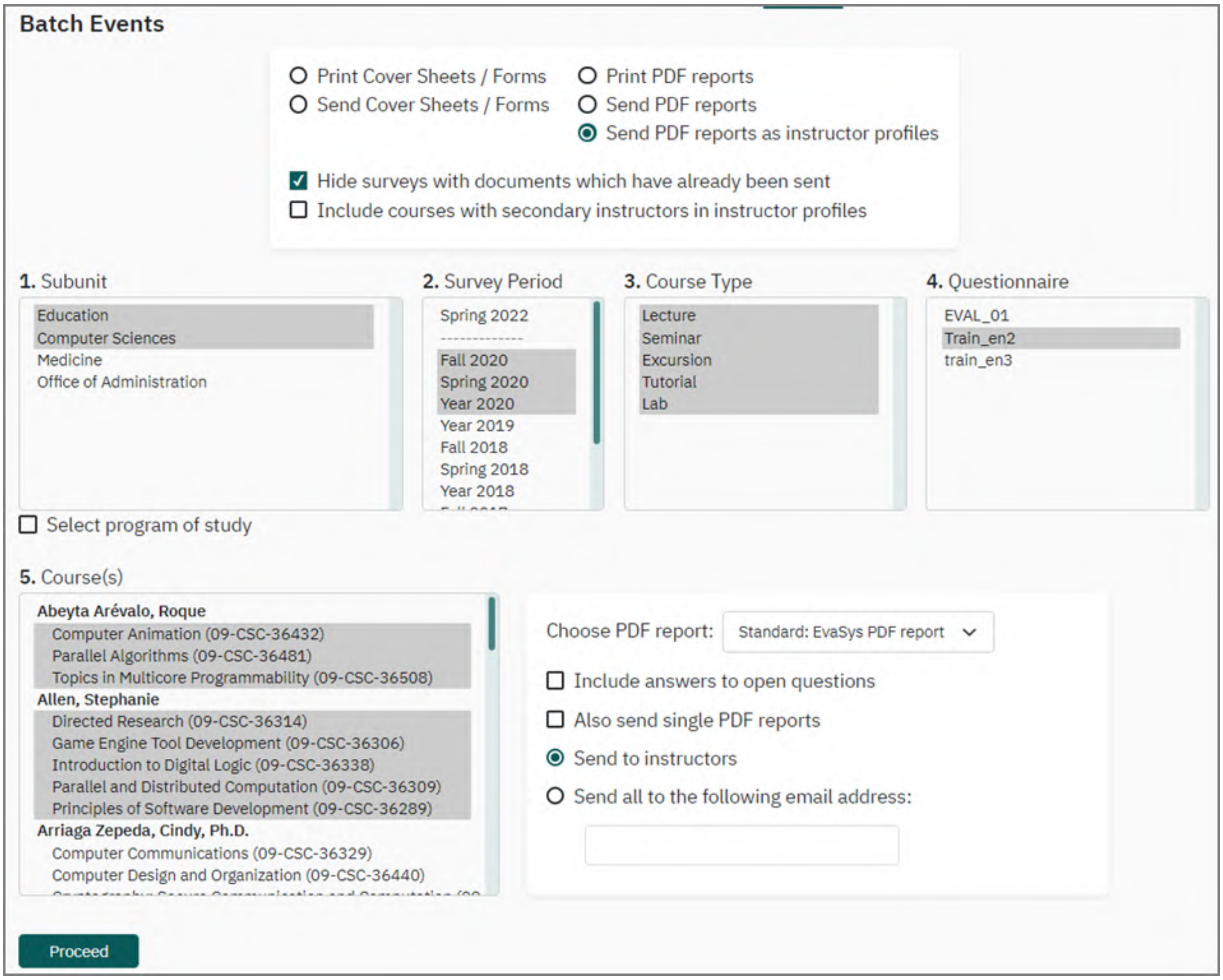


Figure 301: Batch Events: Dispatch PDF Reports as Instructor Profile

The option “hide surveys with dispatched documents” makes sure that no batch event will be used more than once on the same course.

3.21.8. Notes on Languages (English/German)

In evasys users and questionnaires can be assigned languages. When sending questionnaires and reports via “Batch Events”, these language settings are taken into account. This means that all documents are created and sent in the correct language.

The language of emails always corresponds to the user language, i.e. the language which is defined in the user profile of an instructor or project manager (English or German). For further information on user languages see chapter B 2.1.2. “Generating and Managing User Accounts”.

If a questionnaire is available in English and German, the language of the questionnaire is taken into account when creating questionnaires and PDF reports. For further information on defining languages for questionnaires compare chapter B 3.15.4. “Multiple Languages”.

The following table gives an overview on the language rules:

Language Instructor/ Trainer/Project Manager	Language Questionnaire	PDF Report and Questionnaire are created in:	Emails are created in:
English	Undefined	English	English
German	Undefined	German	German
English	English & German	English	English
German	German & English	German	German
German	English	English	German

Table 11: Language usage when creating and sending documents

3.22. Non-anonymous Surveys

Surveys in evasys run by default assuming and protecting the anonymity of the survey participants.

Should the identities of the survey participants be required for example for address reasons as well as later for the processing of survey results, relevant participant data can be imported and used.

Please observe the following legal references when using non-anonymous surveys.

3.22.1. Legal References in Non-anonymous Surveys

Please note, that when conducting non-anonymous surveys, you are processing the personal data of the participants. The processing of personal data is subject to special stipulations of the data protection act, as well as possible regulations of other laws (i.e. campus or labor legislation).

As a rule, elements of these regulations state, that when surveying by means of questionnaires (forms), survey participants are informed of the data processing, in particular:

- of the intended purpose of the data processing,
- of whether the details are voluntary or an obligation exists, together with the consequences of a refusal, as the case may be.
- and of the possible recipients of the data.

The extent of the duty to inform as well as the admissibility of the data process itself depends significantly on the legal requirements under which your particular case is positioned. This assessment depends on a number of factors which cannot be listed here. You can normally get support from your data protection officer, and/or the data protection committee.

Evasys provides reference texts for anonymous and non-anonymous surveys. You can find these reference texts under System Settings/Text Templates/"E-MAIL: Footnote for anonymous online surveys" or "Footnote for non-anonymous online surveys". These text templates are used automatically when sending the PSWDs to interviewee's.

3.22.2. Conducting Non-anonymous Surveys

Non-anonymous surveys can only be realized by the (subunit) administrator.

Observe the following steps so that survey participant data can be used in

Evasys:

- Firstly, import the participant data.
- Ensure that the questionnaire used contains placeholders for the participant data. Otherwise the questionnaires used later cannot be assigned to participants in evasys.
- Create a survey for the relevant course.

3.22.3. Importing Participant Data

Importing the participant data is done centrally via the menu "Subunits/Data Import". Alternatively, a participant list can be imported per CSV for an individual course/an individual topic in the editing view (see below for more detailed information).

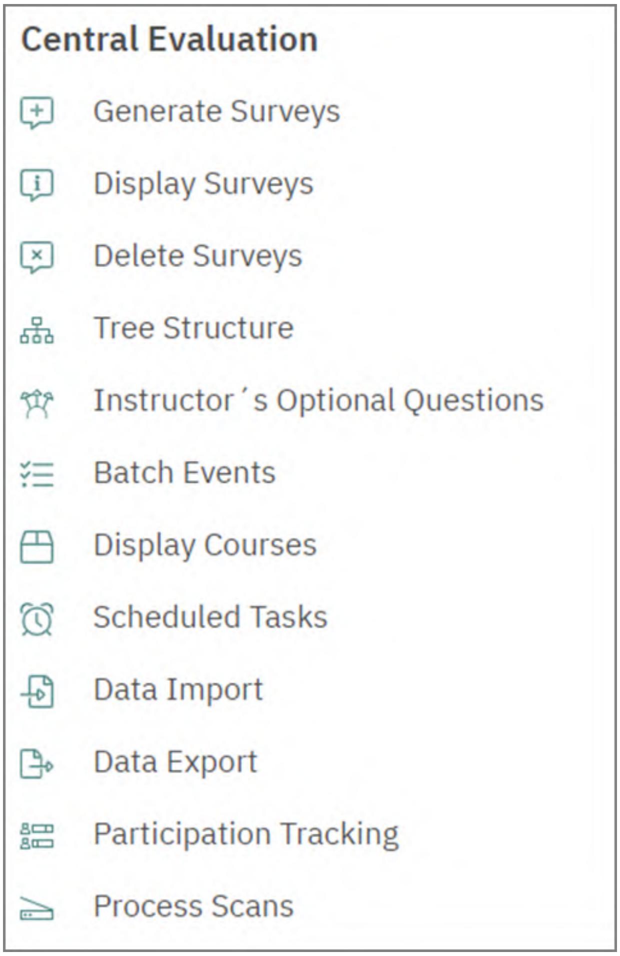


Figure 302: Data Import in the Section "Central Evaluation"

Click the option "Data import". The following window appears:

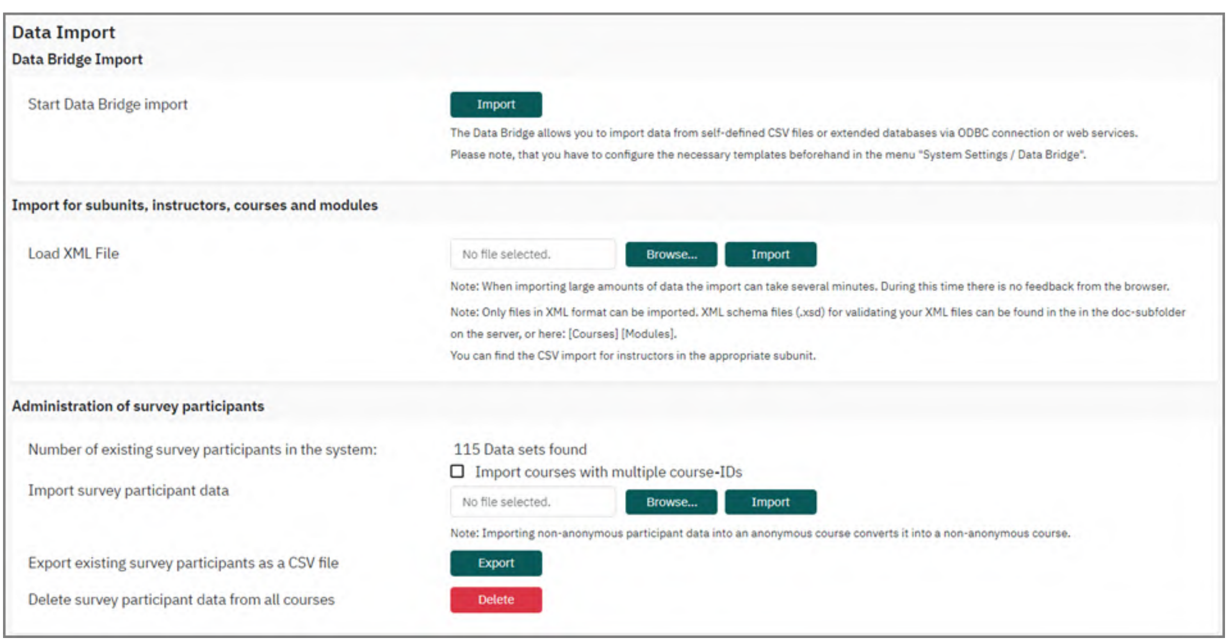


Figure 303: Data Import via CSV File

Use this window to import the data on survey participants – either just course ID and email in the case of anonymous surveys, or further data like name, address and additional information for non-anonymous surveys.

Configuring additional fields for participant information

In order to be able to import additional information, corresponding data fields in evasys first have to be configured. For this, open the menu “System Settings/evasys Settings/User Data Fields” and select the tab “Participants”.

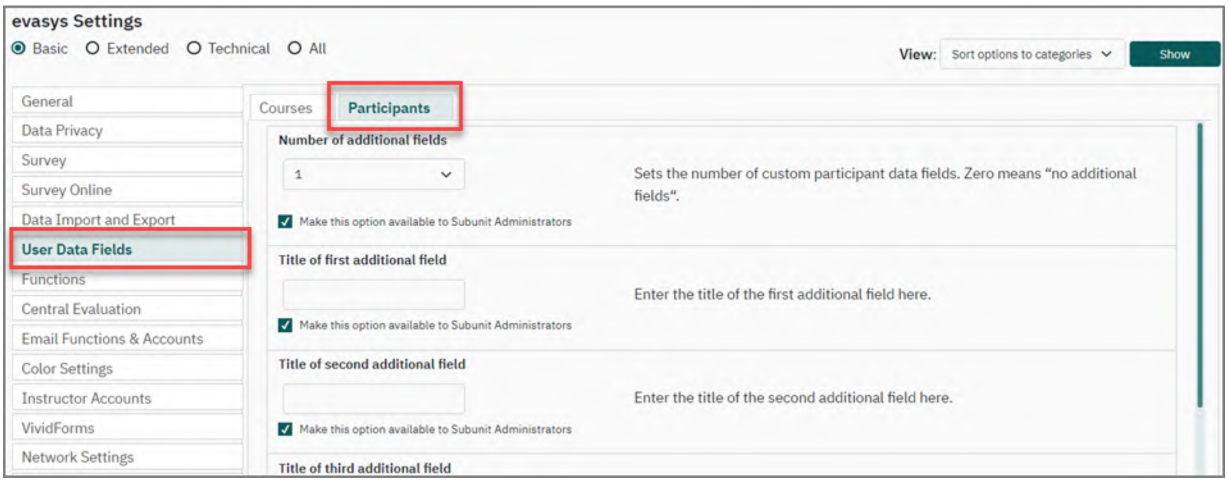
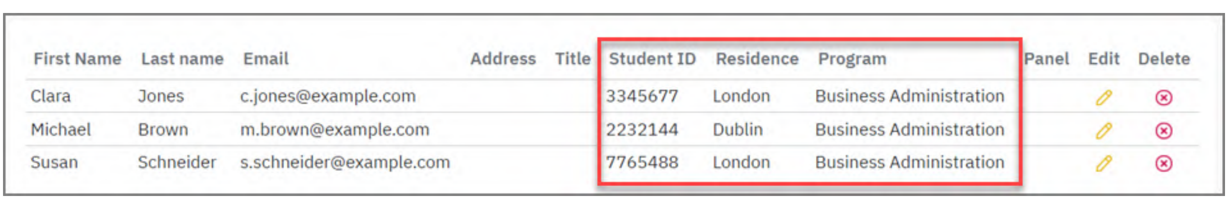


Figure 304: User defined fields for participant information

Set the number of additional fields using the first drop-down menu. A total of 20 fields are possible. For the selected number of fields, enter the titles in the subsequent entry fields. These are displayed later in the participant list as headings for the corresponding information. The information can also be used later for filtering raw data, as well as for filtering in the report creator (any compilation report).



First Name	Last name	Email	Address	Title	Student ID	Residence	Program	Panel	Edit	Delete
Clara	Jones	c.jones@example.com			3345677	London	Business Administration			
Michael	Brown	m.brown@example.com			2232144	Dublin	Business Administration			
Susan	Schneider	s.schneider@example.com			7765488	London	Business Administration			

Figure 305: User data fields in the participant list

Structure of the CSV file

Prepare the survey participant data as CSV file. You can use either a semicolon or the character that you define in “System Settings/evasys Settings/Data Import and Export/ Separators CSV import and export” serves as a separator.

Use the following data structure for importing CSV-based survey participant data:

	Course ID	Email address	Surname	Title	First name	Saluta-tion	Address	Cus-tom 1	Cus-tom 2	Cus-tom 3
Partici-pant 1	DEMO12	hardy@example.com	Hardy		Amy	Mrs.				
Partici-pant 2	DEMO12	smith@example.com	Smith	Dr.	Mary	Mr.				
Partici-pant n	DEMO12	Harrison@example.com	Harrison		Paul	Mr.				

Table 12: Data Structure for Importing CSV-based Participant Data

The header shown in the table is only to support the example. It is not possible to use a header in the CSV file. The CSV file would look as follows in the text editor:

DEMO12,hardy@example.com,Hardy,,Amy,Mrs,,,,

DEMO12,smith@example.com,Smith,Dr.,Mary,Mr,,,,

DEMO12,Harrison@example.com,Harrison,,Paul,Mr,,,,

The field Course ID forms the link to the courses existing in evasys. One import file may contain participant data for any number of courses. If, on a large scale survey, participant data is to be imported into evasys, it makes sense to create and import the CSV import file for survey participant data and CSV/XML files for subunits, user accounts and courses simultaneously.

Note:
As soon as you have imported participant data for a course using this method, evasys assumes that the course is processed through non-anonymous surveys!

When importing participant data, the number of participants noted in the details of a course will be ignored, and the number of imported participants automatically saved.

Import and edit participant data of a single course/topic

There is also the possibility for you to import and edit participant data in the details of a course. To do this, click on the pencil in the course list:

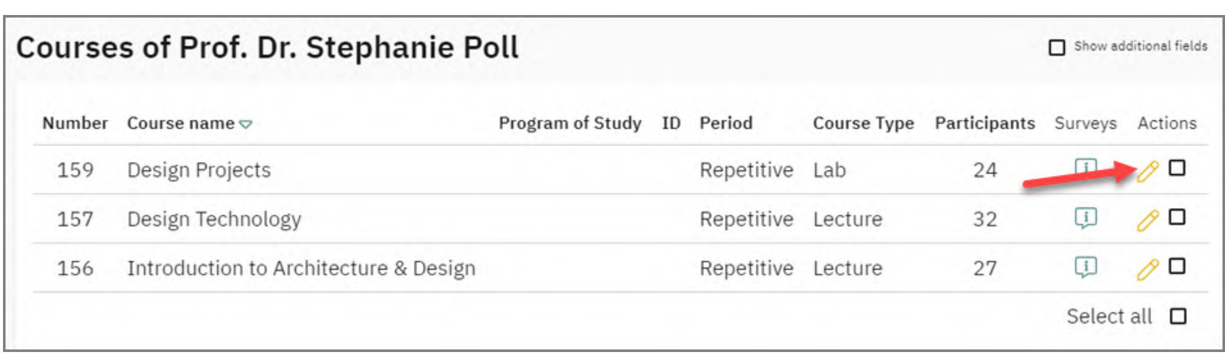


Figure 306: Course List with the Edit Button (column “Actions”)

A window with the properties of the course opens automatically. Here you can define, also afterwards, whether this course should be conducted anonymously or non-anonymously. To do this, click in the area “Participants’ data” either on “Anonymous survey participants” for anonymous surveys or “Non-anonymous survey participant (panel)” for non-anonymous surveys.

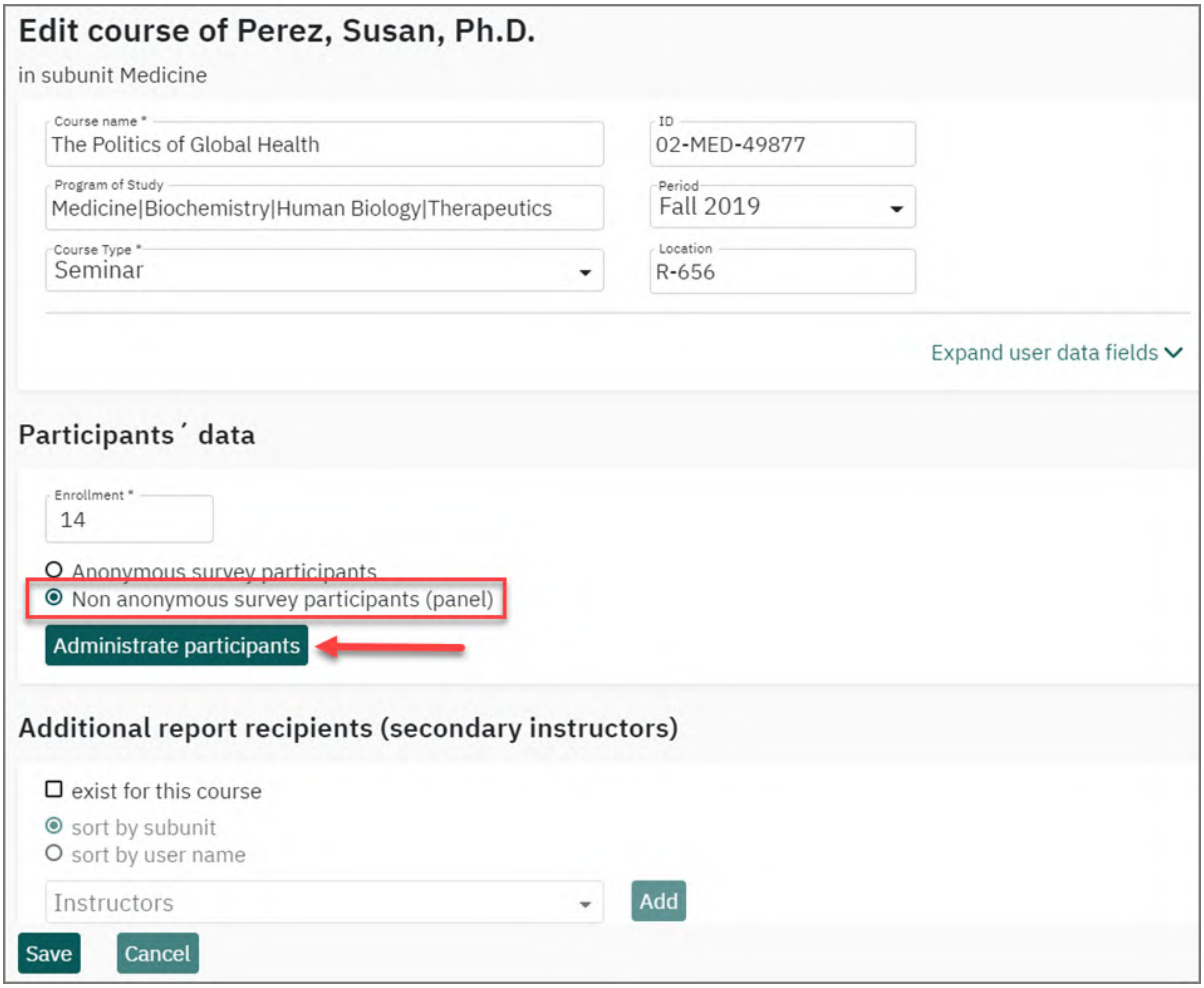


Figure 307: Administrate Anonymous/Non-anonymous Participants

After you have activated the option “Non-anonymous survey participant (panel)”, click on the button [Edit data of participants]. In the following window, you have the now familiar option of importing the data of your participants via CSV.If you want to test the import of participant data first, you can use the sample file "Sample CSV for participants (non-anonymous)" which you can find in the main menu "System information/ Sample files".

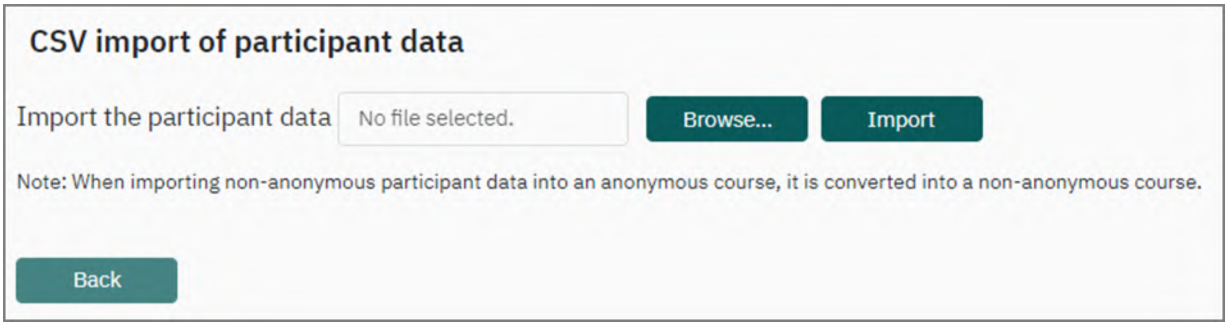


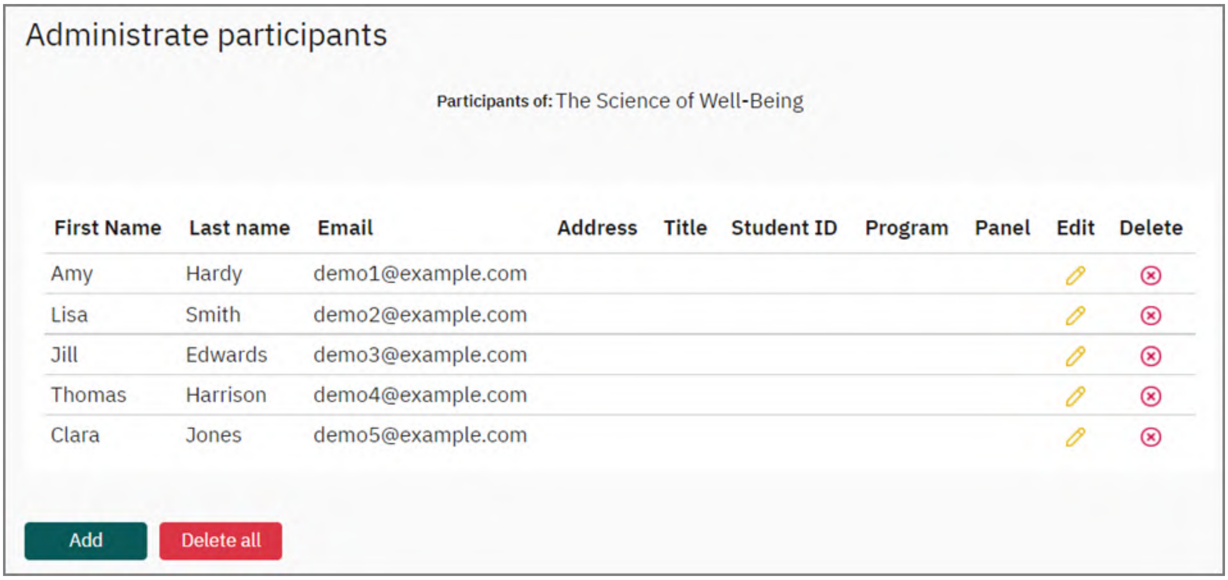
Figure 308: CSV Import of Participant Data

The newly imported participants are added to the already existent participants of the course.

Note:
If in your course you have a participant by the name of Andrew Miller with the email address evasys@example.com and you import, via CSV, the participant Patsy Newman who also has the email address evasys@example.com, evasys will refresh the existing participant, and so overwrite the data of Andrew Miller with the data of Patsy Newman. This means, that the email address of your participants has to be unmistakably assigned to them.

If you wish to edit the imported participant data, click on the button [Edit data of participants]. In the following window you can edit (pencil) and delete (red cross) each existing participant. You can also delete all participants by clicking on the [Delete all] button.

Note:
If you delete a participant who was assigned solely to this course, all of his data will be deleted from the system. As a result, this participant is no longer existent in evasys. Should s/he however also be assigned to another course, his data will remain existent for that course.


Administrate participants

Participants of: The Science of Well-Being

First Name	Last name	Email	Address	Title	Student ID	Program	Panel	Edit	Delete
Amy	Hardy	demo1@example.com							
Lisa	Smith	demo2@example.com							
Jill	Edwards	demo3@example.com							
Thomas	Harrison	demo4@example.com							
Clara	Jones	demo5@example.com							

Add Delete all

Figure 309: List of the Non-anonymous Participants

Additionally, you can add further participants. To do this, click on the button [Add]. The following window will open:

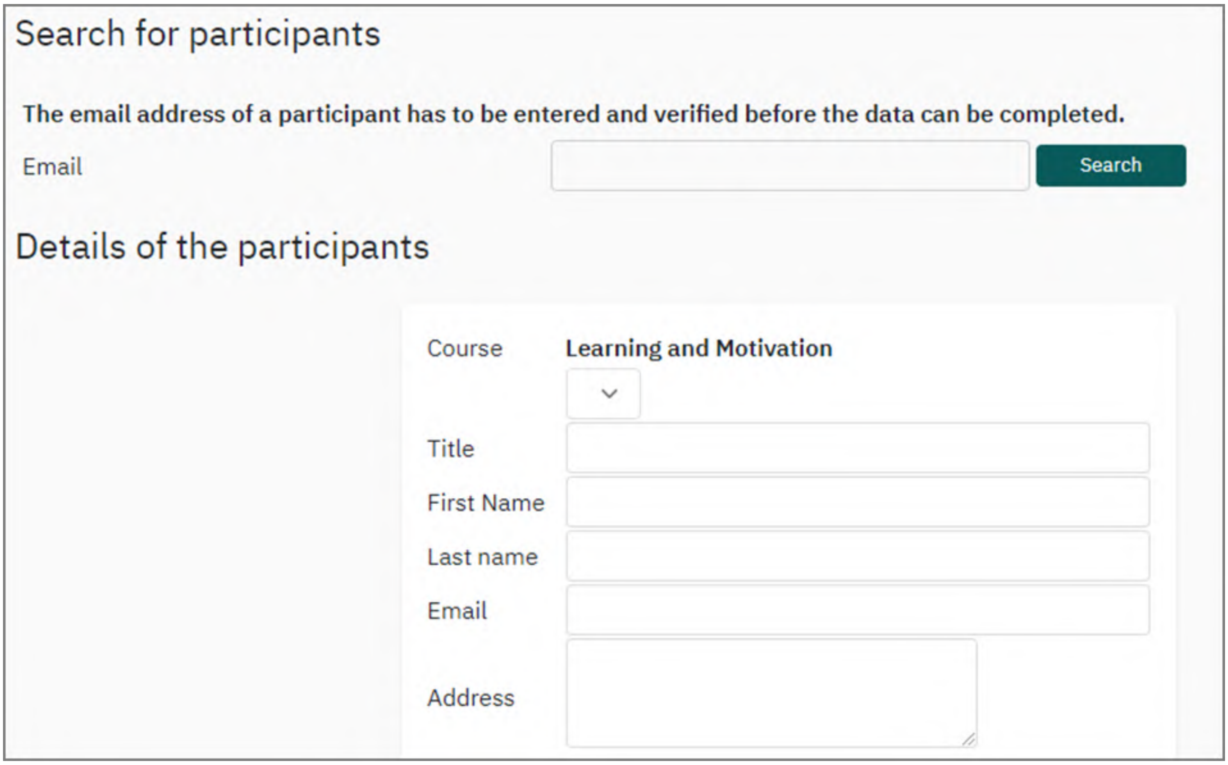


Figure 310: Add Non-anonymous Participants

To add a new participant, you must first enter the email address of the participant in the area [Search for Participants]. Then click on [Search]. evasys searches all existent participant data for this email address.

If the participant is already in the system, for example for another non-anonymous course, evasys adopts all existing data in the area “Details of the participants”. With exception of the email address, you can change these details as and when required.

If the given email address is not yet in the system, evasys adopts this email address in the area “Details of the participants”, and you can add all other information such as name, address etc. You can add further information on the participant such as course of study, type of degree etc. using the three custom fields. You can later on use these criteria to filter the CSV raw data.

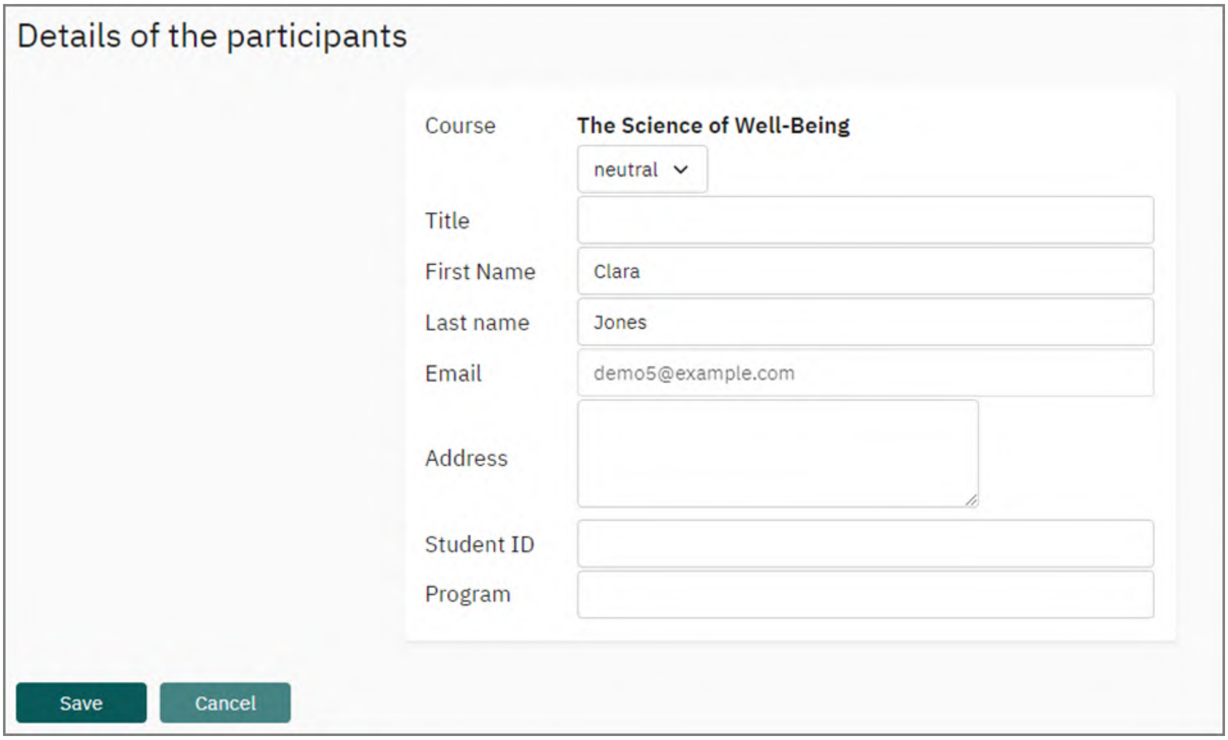
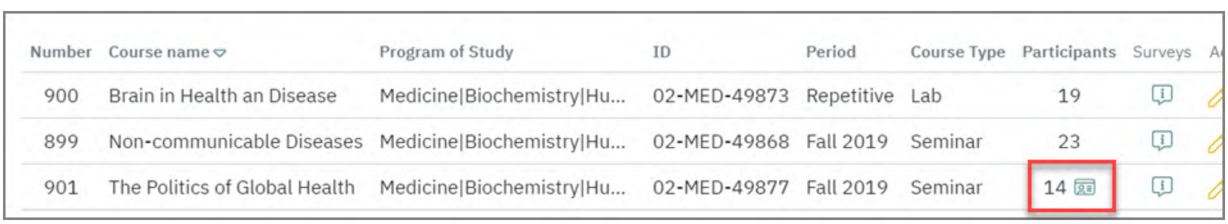


Figure 311: Details of a Non-anonymous Participant

Close the window by clicking on [Save]. The participant has now been created.

Click on the button [Back] at the bottom of the page to return to the course details. Close the window of the course details by clicking on the button [OK]. This course is now saved as non-anonymous. In the list of the course, in the column Participants, it is marked as non-anonymous by the index card symbol:



Number	Course name	Program of Study	ID	Period	Course Type	Participants	Surveys	A
900	Brain in Health an Disease	Medicine|Biochemistry|Hu...	02-MED-49873	Repetitive	Lab	19		
899	Non-communicable Diseases	Medicine|Biochemistry|Hu...	02-MED-49868	Fall 2019	Seminar	23		
901	The Politics of Global Health	Medicine|Biochemistry|Hu...	02-MED-49877	Fall 2019	Seminar	14		

Figure 312: Anonymous and Non-anonymous Courses

3.22.4. Import of Participant Data from Panels

For the recurring surveying of fixed participant groups, it is possible to create so-called panels, consisting of fixed groups of survey participants, and to import the relevant participant data via CSV import. The non-anonymous courses can then be assigned to the occupants of these panels, i.e. there is no longer the need to import a new list for each course, but the participants are simply taken from the relevant panel.

Panels must be established in the system beforehand and their data imported. To do this, open the menu “System Settings/Panel Administration” and click on the button [Create New Panel].

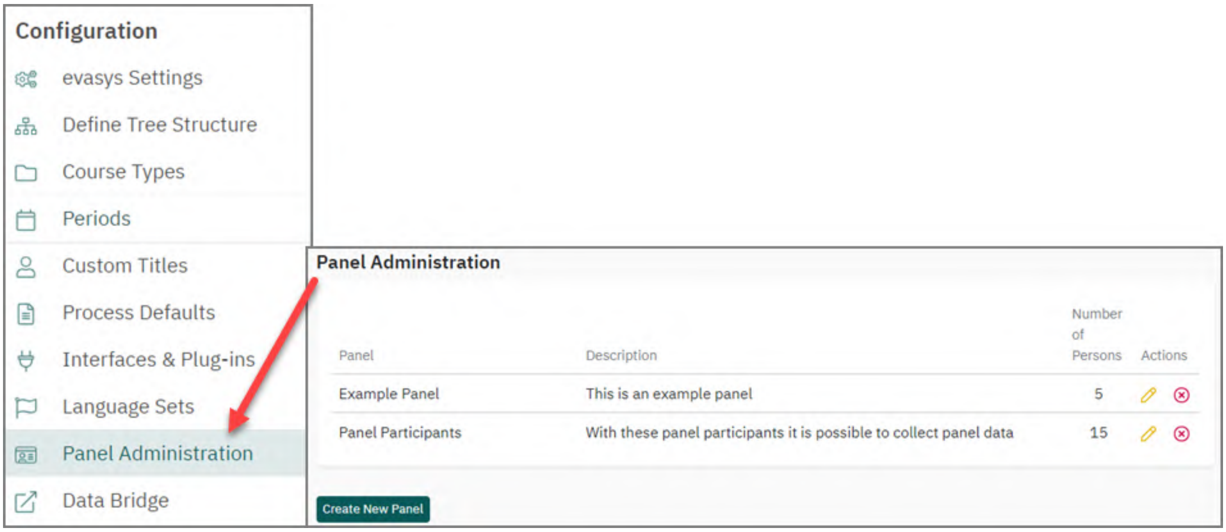


Figure 313: Panel Administration

Now enter the name of the panel as well as a descriptive text and click on [Save]. The panel is created and can be filled with participant data.

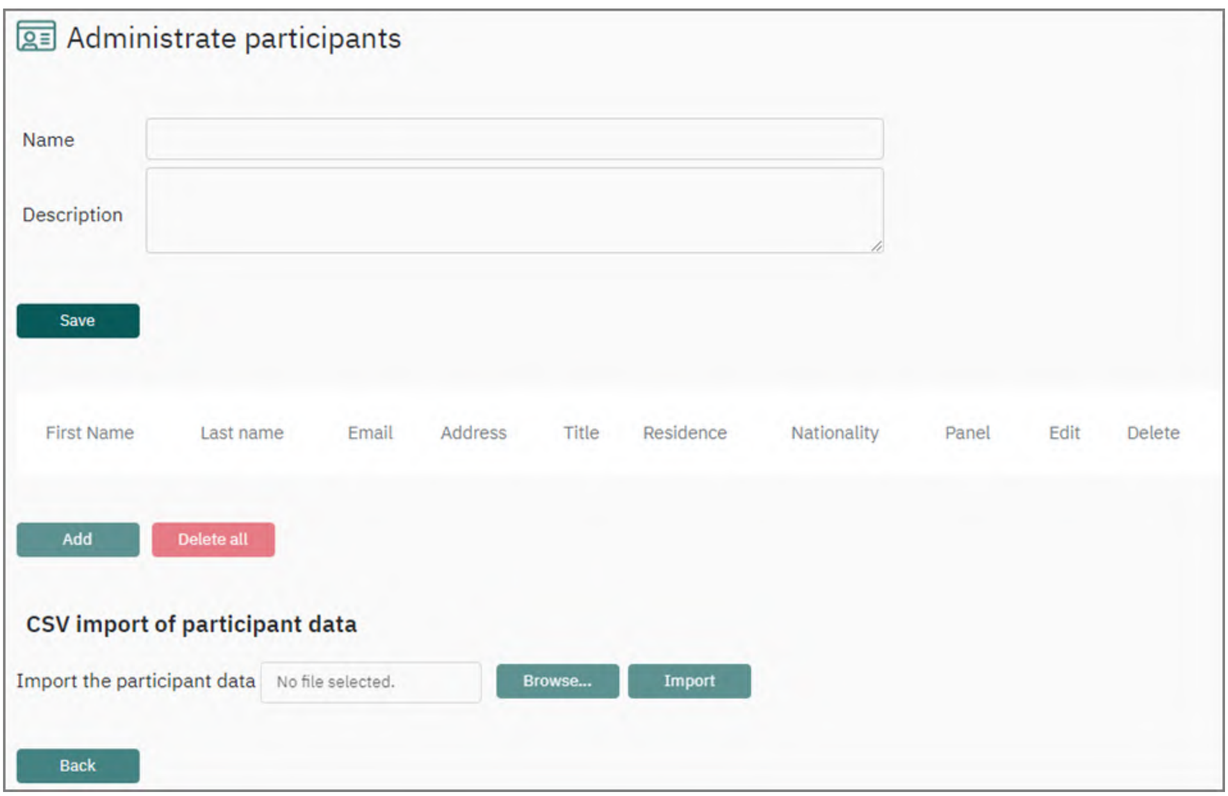


Figure 314: Panel Administration: Create a Panel

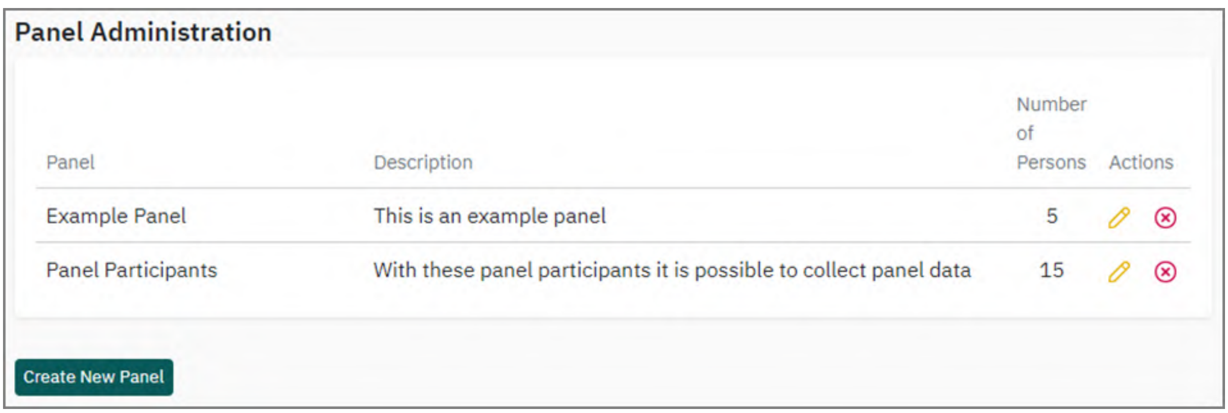
The participants for the panel can either be entered manually or imported with the help of a CSV file. For the syntax of the CSV file, the same rules as described above in chapter B 3.22.3. “Importing Participant Data”, apply, except for the column of the course code which can be left blank.

After importing the data, the participants are displayed in the participant list. Where necessary, individual participants can be edited with the pencil icon or deleted with the X.

First Name	Last name	Email	Address	Title	Residence	Nationality	Panel	Edit	Delete
Axel	Miller	a.miller@example.com		Dr.			Example Panel		
Betty	Meier	b.meier@example.com		Dr.			Example Panel		
Conny	Master	c.master@example.com					Example Panel		
Doris	Smith	d.smith@example.com					Example Panel		
Ernest	Snyder	snyder@example.com					Example Panel		

Figure 315: Panel Administration: Participant List

Any number of panels can be created in the system. They are displayed in the panel administration with their name and a descriptive text and can, where necessary, be edited or deleted.



Panel Administration

Panel	Description	Number of Persons	Actions
Example Panel	This is an example panel	5	
Panel Participants	With these panel participants it is possible to collect panel data	15	

Figure 316: Panel Administration: Overview of the Panels

For the courses, participant data can now be directly adopted from the panel without having to import them again. To do this, open the details of the course and go into the participant administration. Here you have the option in “Import survey participants from panel” to select the required panel and click on [Add] to assign it to the course.

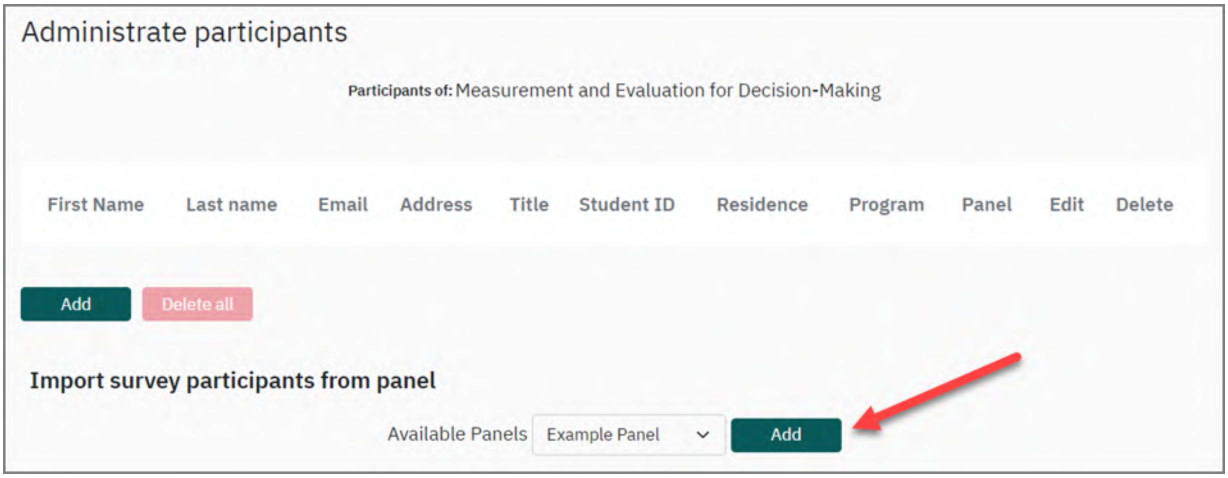


Figure 317: Adopt Survey Participants from Panel

3.22.5. Customizing the Questionnaire for a Non-anonymous Survey

With non-anonymous surveys the questionnaires are assigned to specific participants. So that these allocations can be adhered to during distribution of the questionnaires, you have to insert the relevant information of the survey participants in the header of the questionnaire. This is achieved by placeholders (recognized by the continuous upper case and the angular brackets).

The VividForms Editor/Designer allows you to use placeholders for participant data in the header of the questionnaire. The placeholder names refer to the data structure introduced above, as follows:

VividForms Editor and text templates	CSV import file	Description
[PARTICIPANT_EMAIL]	Email address	Email address of survey participant
[PARTICIPANT_LASTNAME]	Surname	Surname of of survey participant
[PARTICIPANT_TITLE]	Title	Title of survey participant
[PARTICIPANT_FIRSTNAME]	First name	First name of survey participant
[PARTICIPANT_SALUTATION]	Salutation	Salutation of survey participant
[PARTICIPANT_ADDRESS]	Address	Address of survey participant
[PARTICIPANT_CUSTOM1] to [PARTICIPANT_CUSTOM20]	Blank1-20	User-defined field 1-20 of resp. survey participant

Table 13: Placeholders for Participant Data

Click one of the placeholder fields in the questionnaire's header in order to select the placeholders which you wish to insert.

The following figure shows an example questionnaire header. In the left-hand side the text "Participant:" has been inserted as well as variables for the first name and surname.

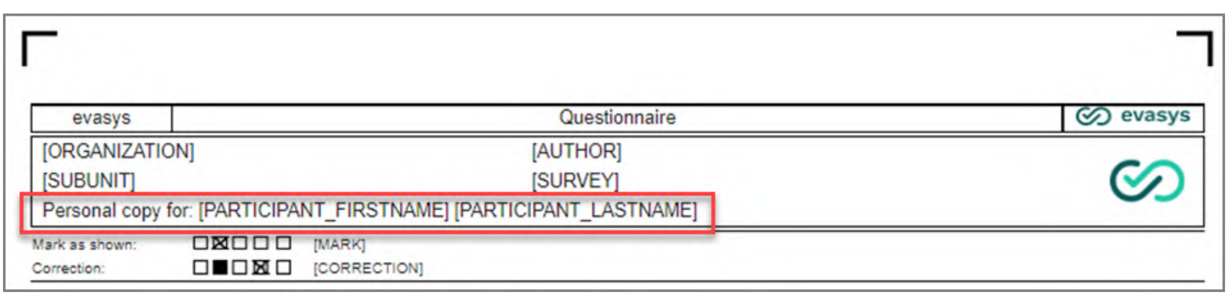


Figure 318: Customization of a Questionnaire (Here through the Name in the Header)

In the case of a survey, data of specific participants is inserted here, so that during implementation it is clearly visible which questionnaire was distributed to whom.

3.22.6. General Direction for the Realization of a Non-anonymous Survey

If you create a survey for a non-anonymous course (here: “Managing and maintaining a healthy lifestyle”), it will be indicated as such in the survey details, that this survey is taking place with non-anonymous participants.

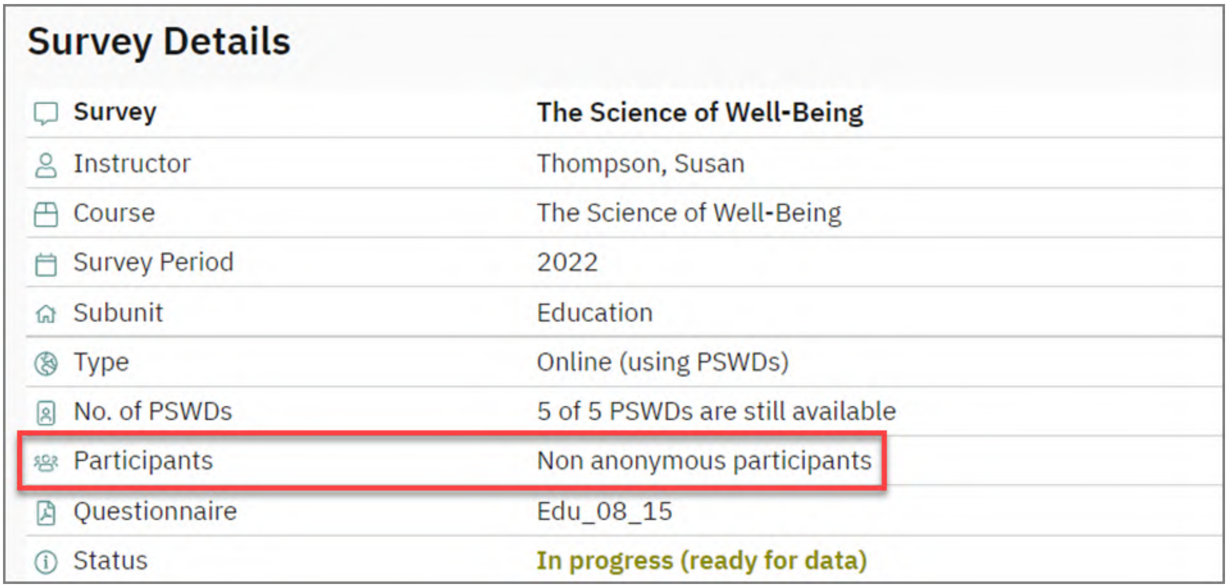


Figure 319: Reference of Non-anonymous Participants

With non-anonymous online surveys you also have the possibility of indicating the status of anonymity in the footnote of the email. For this, you can use existing standard texts from “System Settings/Text Templates”.

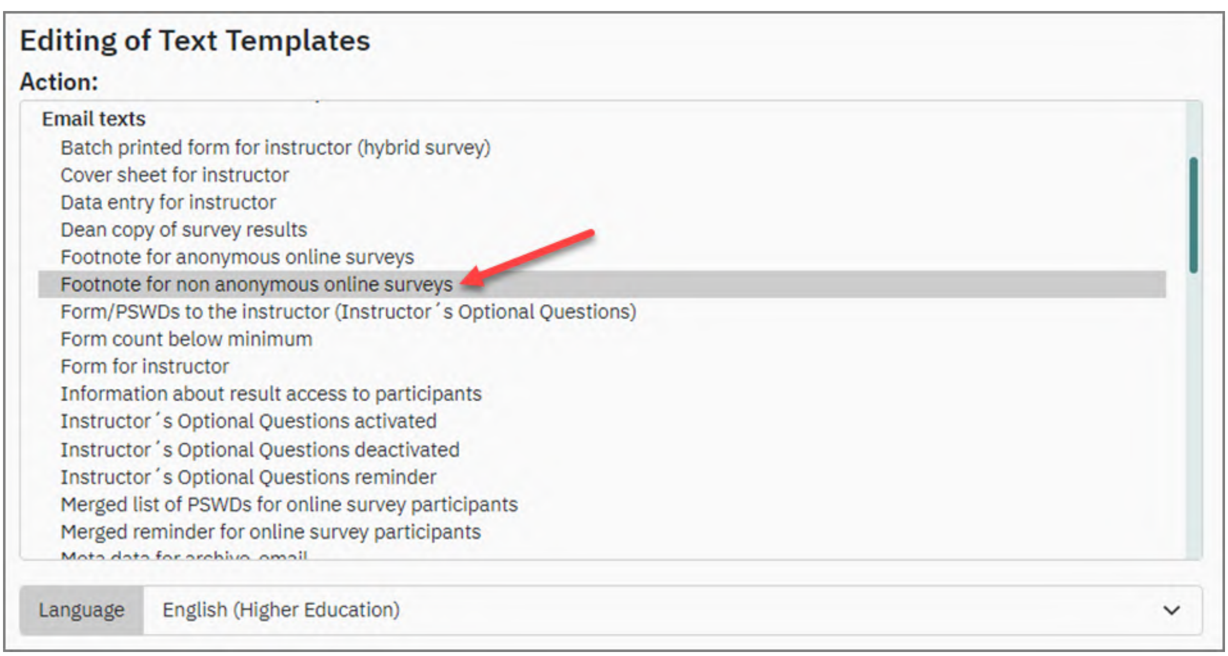


Figure 320: Reference for Anonymous or Non-anonymous Online Surveys (Text Templates)

In addition to this, you can always render a non-anonymous survey anonymous, by removing the participants' data from the survey details. You must confirm this action by clicking on [OK]. In doing so, all information on the participants in the raw data exports for SPSS and Sphinx, as well as in the CSV-export, are deleted.

After clicking on [OK], a message window indicates the removal of the information to you. At this point, you still have the option of aborting the process:

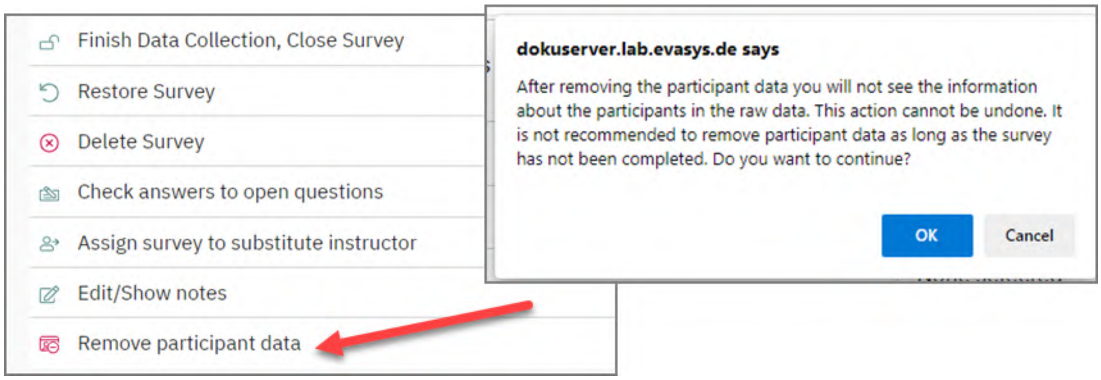


Figure 321: Subsequent Anonymization of a Non-anonymous Survey

Note:
This retroactive anonymization cannot be undone! If you remove the participant data from the survey, they are irrecoverably lost for this survey!

3.22.7. Implementing a Non-anonymous paperbased Survey

When you create a survey with a customized questionnaire for a course for which participant data was imported, evasys assumes that it is a non-anonymous survey. Therefore, for paper surveys, each questionnaire has to be personalized (for example the participant's name has to appear in header). This is why the cover sheet procedure is not suitable for non-anonymous surveys.

However, you can also use the function “Print Cover sheets/Forms” in batch procedures so as to produce personalized PDF questionnaires for all survey participants. To do this, select in the configuration of the batch procedures the option “Create complete sets of questionnaires according to enrollment figures”.

After a click on “Download” the respective PDF file is produced and displayed. Please note that the number of generated questionnaires is determined by the number of occupancies defined in the courses, and not by the number of imported participant data for the respective course.

Example:

In the following, you will find an example for a personalized questionnaire. The text below with placeholders was inserted into the header:

Figure 322: Personalized Questionnaire

Now the survey can be implemented, whereby attention has to be paid to the fact that the person specified on the questionnaire is actually the person who fills it in. The subsequently generated PDF report of the survey does not contain any information on the survey participants. If these are to be processed, this can be effected through the batch export in which you find information in the following two paragraphs (paragraph on non-anonymous surveys).

3.22.8. Implementing a Non-anonymous Online Survey

For online surveys it is possible to use information taken from the survey participant data for the personalization of the emails that are generated for the dispatch of participation codes. Alternatively, personalized PSWD cards can be printed if mailing is not desired.The placeholders shown in the previous paragraph can also be used for the text templates. It is advisable to use customized text templates for individual questionnaires and not to modify the standard template for the PSWD dispatch.

Example:

In this example, the recipients of the PSWD emails are addressed personally by using the placeholders for first names and surnames of the survey participants:

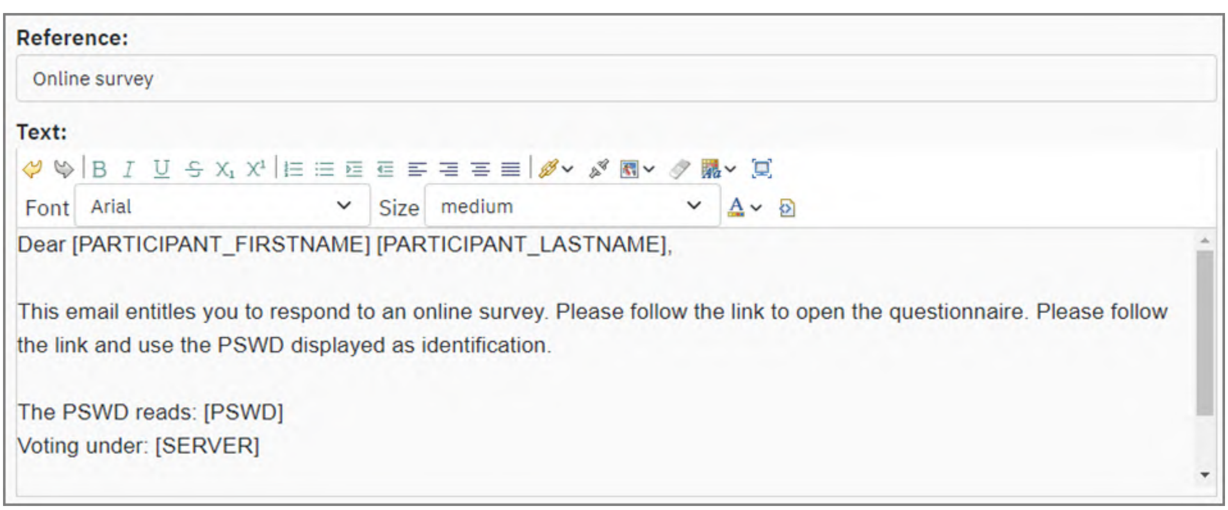


Figure 323: Personalized Questionnaire-specific Email Text

The resulting email text in its personalized form looks like this:

> Dear Amy Hardy,
>
> This email entitles you to vote in an online survey. Please follow the link and use the PSWD displayed as identification.
>
> The PSWD reads: NK6CK
> Voting under: http://192.168.245.129/online
>
> Yours Sincerely,
>
> The evaluation office.
>
> --
>
> Note: This survey is non-anonymous. If you take part in this survey with the above named PSWD, your given answers can be associated with you.

Figure 324: Email for Amy Hardy (example)

As an alternative you can also use the placeholder [PARTICIPANT_SALUTATION2] to address the participants. With this placeholder, the complete address including a salutation (“Dear Mrs.”/“Dear Mr.”) will be generated.

PSWD cards for non-anonymous online surveys

Generate your non-anonymous surveys as usual. Please consider that in any case you will have to import participant data (name, email address etc.), even if you do not send PSWDs by email. Only if participant data has been imported, the PSWDs can later be assigned to the participants.

The text for the PSWD cards can be adapted in the questionnaire details. Please select the option „Text Templates“ in the advanced settings. The text template is named “Instruction text for PSWD cards”. In the instruction text you can use all available participant placeholders such as first name, last name, email address etc. All available placeholders for use on the PSWD card can be found in chapter D 2.1.8. “Placeholders for Text Templates and Questionnaires”

A sample text template containing first name and last name of the participant could look like this:

Personal PSWD for [PARTICIPANT_FIRSTNAME] [PARTICIPANT_LASTNAME].

Please use a web browser to open the following web address:

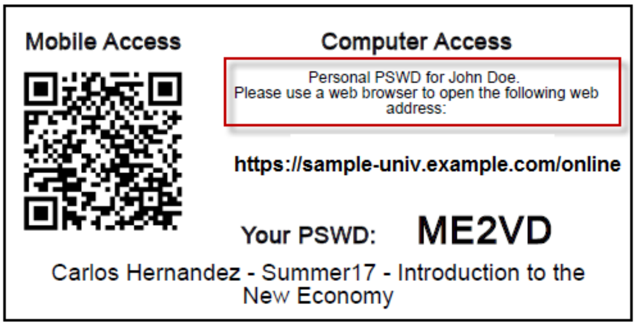


Figure 325: Sample PSWD card with participant name in instruction text

Please make sure that the instruction text is not too long and perform a test with the customized text template beforehand.

3.22.9. Processing Survey Participant Data

The batch export function is available to create statistical reports on survey participants. The data fields for the survey participants are added on the right-hand margin to the raw data table relating to the respective surveys:

	AO	AP	AQ	AR	AS	AT	AU	AV	AW
1	Participant email address	Participant Salutation	Participant Title	Participant First Name	Participant Surname	Participant Postal Address	Custom 1	Custom 2	Custom 3
2	a.hardy@example.com	Ms.		Amy	Hardy		Business Studies		
3	m.brown@example.com	Mr.		Michal	Brown		Computer Studies		
4	s.miller@example.com	Mrs.		Samantha	Miller		Business Studies		
5	j.gabriel@example.com	Ms.		Janet	Gabriel		Business Studies		
6	r.fletcher@example.com	Mr.		Rupert	Fletcher		Computer Studies		

Figure 326: CSV Files of a Non-anonymous Survey

Note:
So that all participant data fields are exported, the option “System Settings/ evasys Settings/Data Import and Export/Raw data export contains only the ID of non-anonymous participants” has to be deactivated. Otherwise, only the email address of the participants as the sole identification feature will be exported.

3.22.10. Use the Participant Data for Participation Certificates

All above mentioned placeholders ([PARTICIPANT_LASTNAME], [PARTICIPANT_FIRSTNAME] etc.) can also be used for the participant certificates for online surveys.

3.23. Active Instructor Accounts

(not Cloud Standard)

Surveys cannot only be conducted by administrators or subunit administrators but also by project managers or instructors/ trainers within a so-called active user account. Please pay attention to the license terms of your evasyslicense. The standard license allows you to shift all types of surveys, which are necessary in the context of quality management, to active user accounts and thus give other persons within your organization the opportunity to carry out survey projects independently in a separated survey account.

If you, as a university, would like to give a larger number of teachers and students access to your system, you will need an additional license for research and teaching. With the additional license, students and researchers can carry out all survey projects, such as (student) research and third-party funded projects or final theses. It is assumed that these evaluation projects will be carried out within regular university operations. The license can be used by university staff, lecturers and students.

There are two different ways of licensing: You can purchase a license extension for your existing evasys system. Here you can benefit from the existing evasys infrastructure and can add areas for third-party survey projects to your system.

If the collection and evaluation of third-party survey projects is to be completely separated from the existing evaluation data due to internal regulations, the license can also be installed parallel to an existing evasys system. If this is the case, either a second server has to be provided or the Managed Hosting offer of evasys GmbH must be used. If you chose this option, a clear separation between data and user is ensured. The conduct of surveys takes place within separated decentralized user accounts. Administrators cannot carry out central surveys in this system.

If you are interested in an additional license for the use of evasys in research and teaching, please contact your vendor.

The following gives you a small overview of the possibilities of an active user account. For further information, please use the separately available "Active User Manual" (see Chapter A "Additional Manuals") as well as the Quick Start Guide. Both documents can be downloaded from the "System Information" menu.

3.23.1. Creating Active Instructors as (Subunit) Administrators

To grant an instructor authorization to implement his own surveys, you as the (subunit) administrator have to ensure three things:

- The instructor (with sensible log-in data) must exist in the structure which you as the administrator have created.

  By creating instructors, you decide on the rights which an active instructor is granted. Of course, you can change these rights again at any time:

  - Is an active instructor authorized to create new questionnaires, edit the administrator's templates or can s/he only use central templates with which to create his surveys?

    For this purpose, you set the respective rights in the mask for Creation/Modify user data, option “VividForms Editor”. You have the options of: Unrestricted access/ Extension of templates only/No access:

Figure 327: A User’s Access to the VividForms Editor

The names are relevant and describe the above-mentioned rights.

- Is an active instructor upon completion of processing, authorized to view to which degree his surveys meet the quality guidelines – or even those of his subunit (possibly those of additional subunits) or even those of the entire system?

  You also grant these rights in the mask that serves to create and change user data. The following options can be chosen from: No QM views/Only own surveys/Only own subunit/Unrestricted access.

  If you wish to authorize access to one’s own subunit or extend one or more accesses, first select the option “Own subunit only”. Then you can define further subunits by selecting “Additional subunits” in the gray area.

Figure 328: A User’s Access to QM Views

Once you have assigned these rights, please remember to create an appropriate log-in name and a password.

- The instructor must be activated. From the user overview you as the (subunit) administrator can see whether an instructor is activated. A icon with a padlock in front of an user name means this is a passive user (Jasmine Sadhi), no padlock added to the icon signals an active user (Prof. Sunny Narrow). To switch simply click on the icon.

Figure 329: Passive (with Padlock) and Active (without Padlock) Instructors

You can switch the instructor between active and passive at any time, for example denying access after an activated period.

- You have to pass on the access data to the instructor: log-in name, password and the link to the evasys homepage. Otherwise s/he cannot log on even if you have created and activated him. If you want to avoid having to assign individual passwords to each user, an LDAP connection of your system is a possible solution. For further information see chapter D 2.4.3. „LDAP Settings“.
- You as the administrator need to check that you have adapted the information text in your system that appears automatically when an active instructor logs on. You will find the text in the main menu “System Settings”, in the sub-menu on the left-

hand side under “Text templates”. It is titled “evasys: Information text for quick start page (active instructors)”:

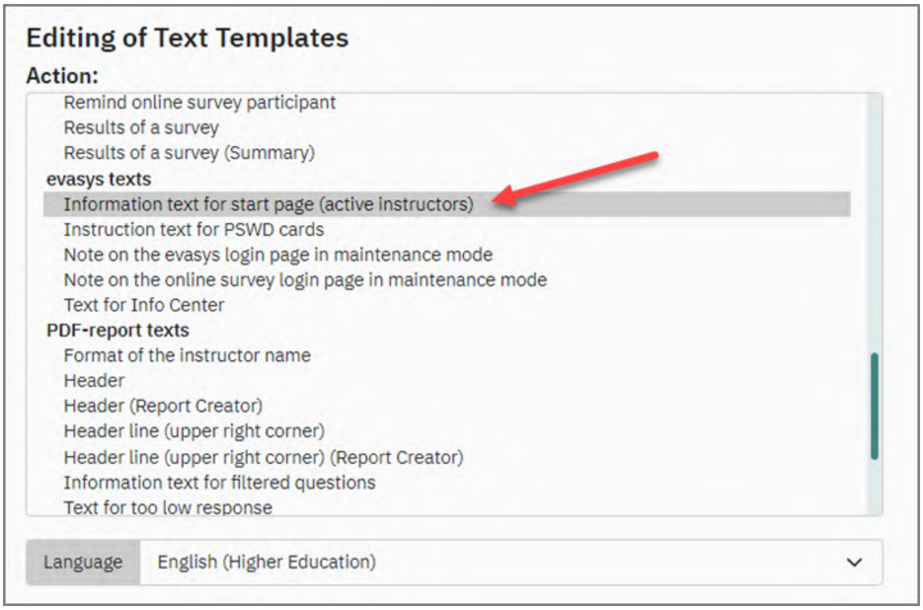


Figure 330: Editing the Welcome Greeting for Active Instructors

Modify the text as you see fit and then click on [Save].

A subunit administrator has no access to these texts, therefore, s/he cannot check this setting. Please consult your evasys administrator on this.

- If, as administrator or subunit administrator, you carry out surveys for this user during the central evaluation, you can specify in the configuration whether the user may also retrieve the reports from the central evaluation via his/her active access (“System Settings/evasys Settings/Central Evaluation/Active instructors: Access to reports from central evaluation”). In addition, it can also be specified if the user may retrieve reports on surveys for which s/he/she is defined as secondary instructor or further report recipient (“System Settings/evasys Settings/Data Privacy/View reports as secondary instructor”).

As soon as you have secured these details the instructor can log on with the details that you have supplied him with.

3.23.2. Login as Active Instructor

In order to log in, the active instructor calls up the evasys Log-in window and enters his access data here. Subsequently, a window appears with the greeting text:

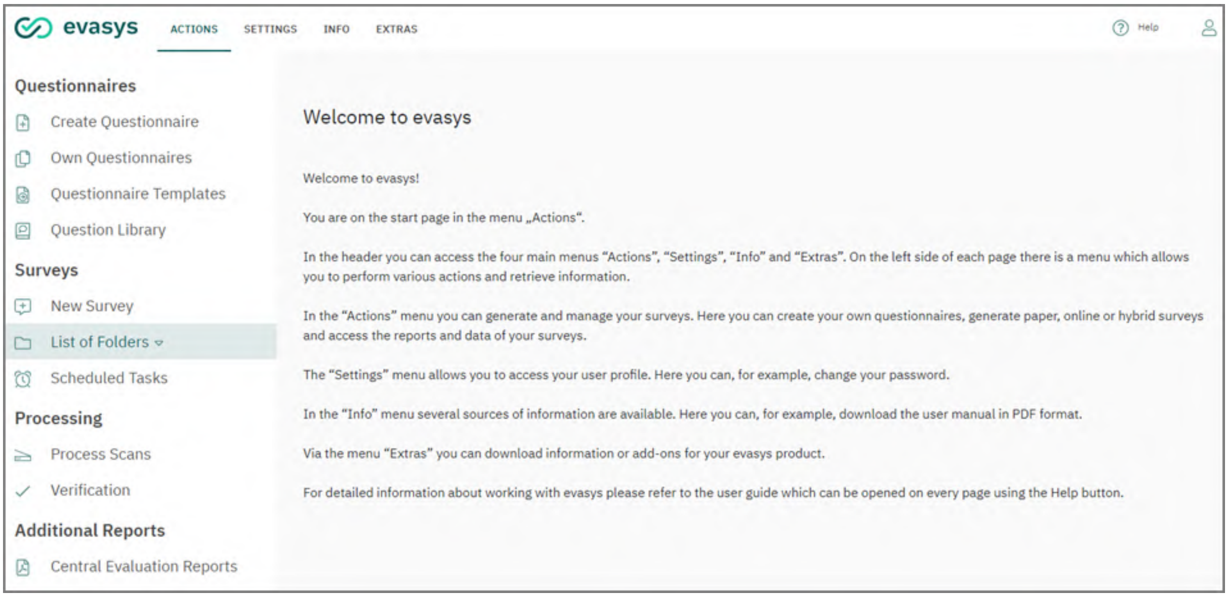


Figure 331: Greeting Screen

It is important that the instructor changes his access data in the menu “Settings/User Profile”.

Depending on the rights granted to the active instructor, s/he can now create new questionnaires, amend existing templates or create surveys only with existing questionnaires. Accordingly, s/he sees in the left menu either “Questionnaires”/“Create Questionnaire” and “Templates” or only “Questionnaires” and “Templates”, or none of these options:

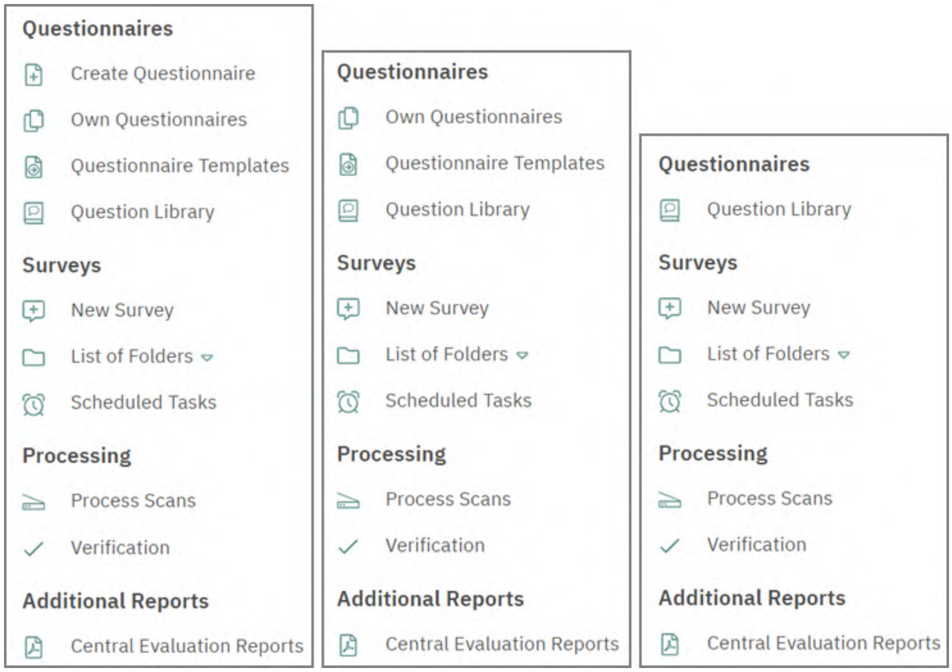


Figure 332 a-c: Access Options to the Questionnaire Editor, to Templates or No Access

For further information on using an active user account, please refer to the separately available "Active User Manual", downloadable from the "System Information/Documentation" menu.

4. Phase 3: Capture and Instant Feedback

When the first questionnaires have been returned, the capture operations begin.

Make sure that the personnel who will be capturing the questionnaires are well trained in every aspect of the capture operation. The scanning procedure is a critical moment in the processing of the questionnaire. If the paper has been put in improperly or if the settings of the scanner have been unintentionally changed then further processing of the survey may be impossible.

evasys is set for maximum automation. A number of manual checking and correction steps which are crucial for the processing of complex questionnaires like invoices have been automated for the processing of questionnaires used in teaching evaluation surveys, which are relatively simple to read.

Before beginning a capture session we recommend testing that the operation is correct by scanning test questionnaires. If everything is OK, then, provided that the paper and print image quality remain the same, you can proceed to large scale capture of forms.

4.1. Scanning the Forms

The capturing of forms is performed with the help of the software “evasys Scanstation”. The communication with the scanner uses the TWAIN protocol.

To capture questionnaires, put the forms into the feeder of the scanning device and open the Scanstation. The scanning process is initialized by clicking the button [Scan]. The further processing is fully automated.

Via the button [Settings] the Scanstation can be configured, if required. Via the button [Manual] a detailed documentation can be opened.

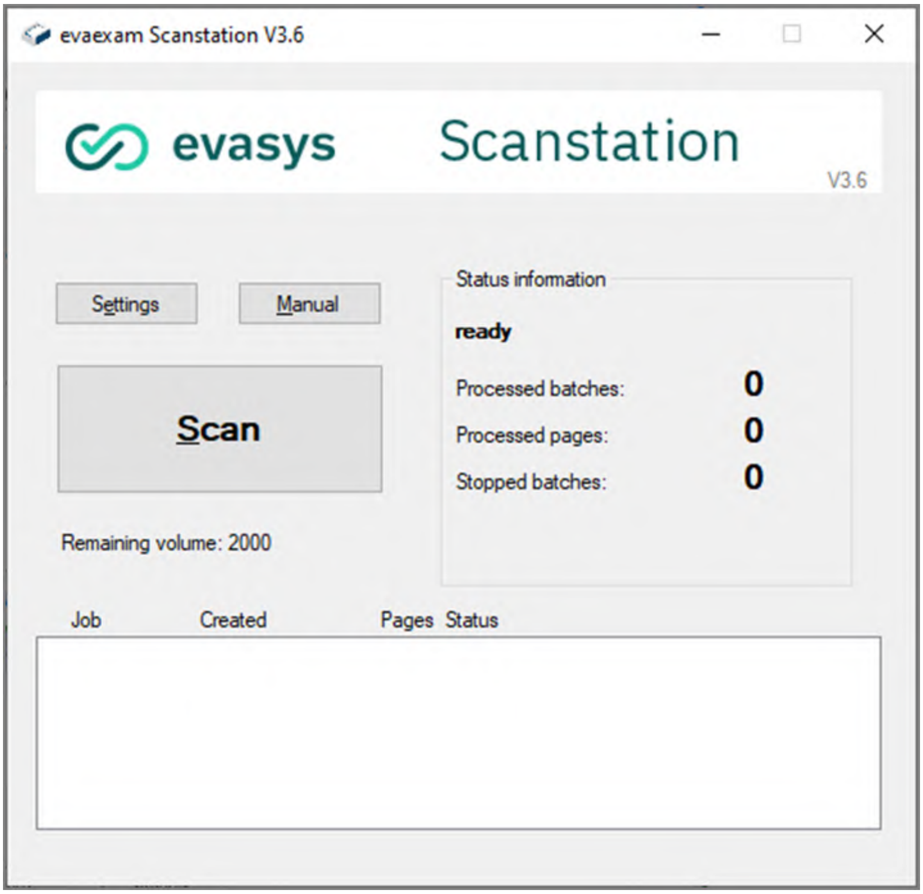


Figure 333: Scanstation

For further information on the scanning process as well as on the settings of the scanstation please see the “Scanstation Manual”, which can be opened via the Scanstation interface or via the evasys menu “System Information/Manuals”.

4.1.1. Scanner Settings

To allow for a successful processing of forms with evasys, the scanner has to be configured in a specific way. The following standard settings apply to all models:

- Image Mode: Black and white
- Paper Size: A4 (210 x 297 mm)
- Resolution: 200 DPI
- Brightness: The threshold value should be slightly darker than average.
- Skew Correction: Deactivated
- Scan Type: Duplex (simultaneous scanning of both sides of the sheet)

Scanner configuration can differ in detail depending on the model and manufacturer. For more information, please consult the documentation supplied with your document scanner.

4.1.2. Important Rules for Scanning

You should adhere to the following rules when scanning your forms:

- Before scanning, please do a quick visual check of your paper questionnaires. Ensure that on all pages at least three corner stones are visible and undamaged and that the barcode is not stained, colored or damaged. If more than one corner stone is missing or if the barcode is damaged, the form cannot be automatically processed.
- Remove scribbling paper from the questionnaire batch.
- If you have stapled your questionnaires, remove the staples before scanning the forms. Please cut off the corner neatly and do not remove the staples with the help of pincers, as this may lead to paper jam in the scanner due to jammed pages.
- Put the paper into the paper feeder of the scanner. Make sure that it is put straightly in the feeder.
- If you have more questionnaires than fit into the feeder, scan your forms in several batches one after another.
- If you have not used serial numbering, please ensure that you scan your forms in the correct order so that the questionnaire sets are kept together. If multipage questionnaires have been mixed up and you have not used serial numbering, the datasets cannot be held together correctly. This does not affect the overall result of the survey, but it affects further subgroup analysis.

Insert the paper as shown in the illustration.

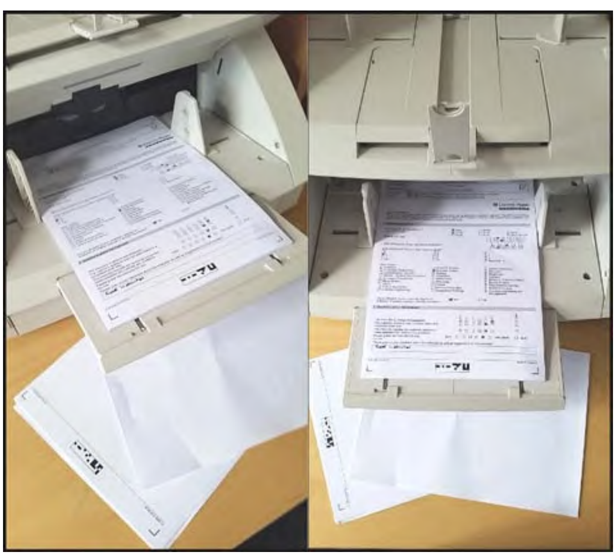


Figure 334: Correct insertion of questionnaires

The survey ID (the double, seven-digit number on the cover sheet or on the first page of the questionnaire) must be on the first page of the batch.

In the cover sheet procedure the cover sheet must be scanned first.

If the questionnaires have more than one page, the questionnaire sets should be, if possible, scanned in a sorted sequence.

If multiple page questionnaires are mixed up then processing is still possible and the final results will be accurate but an analysis of subgroups cannot deliver accurate results unless a serial number has been added during batch print.

Now start the scanning operation. As a rule documents are scanned on both sides of the page (duplex), which is counted as one page each. If you scan 12 pages of paper printed on one side then the message box in duplex operation will show 24 pages scanned. Afterwards empty pages will be automatically eliminated so that there will be no interference with the data capture.

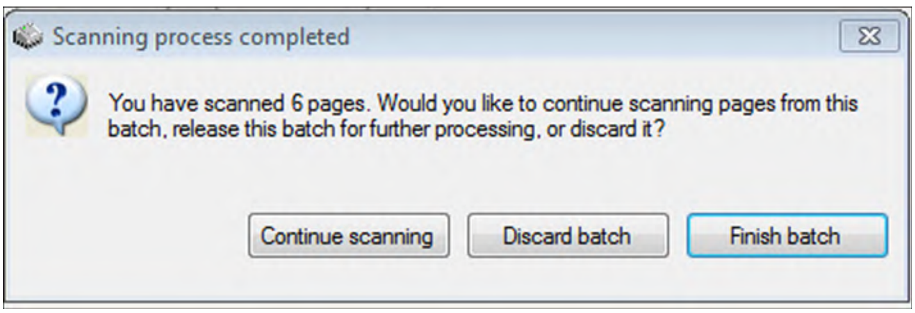


Figure 335: Release/Cancel Batch

Now select [Scan more], if you want to capture a further batch from the SAME survey.

Select [Cancel batch] when the scanning is completed. The scanned forms will be transmitted to the evasys server and further processing is automatic. In order to scan another survey click in the main window [Scan].

If the scanning operation was not successful then click on [Release batch] in order to destroy the data scanned from the current scanning operation and to repeat as a new scanning operation.

Hint:
If completely empty questionnaires are in the batch, you can decide via a central configuration setting whether they should be calculated or not in the return of a survey, and whether, in this way, they influence the response rate of the survey. If you do not want to include them, activate the setting "Delete blank questionnaires" in the menu "System Settings/evasys Settings/Functions/General". The empty returns are then deleted directly after scanning (or after an empty online return has been submitted). In the case of questionnaires with multiple choice questions, you can specify separately when a multiple choice question is deemed as unanswered, and thus the return as empty. For further information, compare the notes on the configuration switches in chapter D 2.5.7. "Functions"

4.2. Reading the sheets with Scan Upload and Scanstation light

If licensed, administrators and subunit administrators can use a simplified Scanstation light and a scan upload function directly in the evasys interface instead of the full version of the evasys Scanstation (without additional installation of a local software component). This function is available by default for Cloud Standard users.

If a corresponding license exists, an additional menu entry "Process Scans" is displayed in the "Subunits" menu.

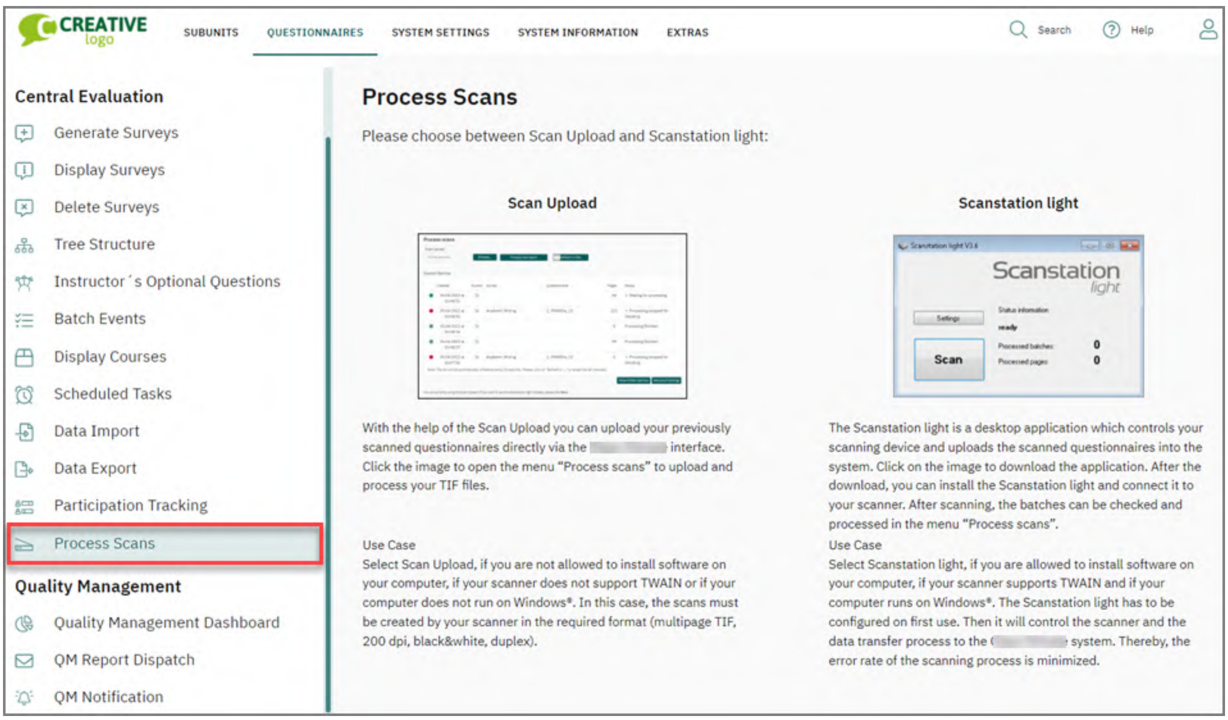


Figure 336: Process scans menu

Click the corresponding symbol to choose between the options "Scan Upload" and "Scanstation light".

Hint: Which way to choose?

Scan Upload

The Scan Upload function can be selected if your scanned questionnaires are already available as files and if you do not want or cannot install additional software on your PC. Besides, you should select this method if your scanning device does not support a TWAIN interface. When using the Scan Upload you have to ensure that your scanning device is configured correctly (multipage TIFF, 200dpi, duplex,black&white).

Scanstation light

The Scanstation light is a simple form of the Scanstation with limited configuration options. If licensed, it can be downloaded directly from evasysand installed on your local computer. The scans are captured via a connected document scanner and uploaded to your evasyssystem for direct processing. The scanned batches are shown in the “Process Scans” menu in evasys and can be further processed there.

4.2.1. Upload TIFF Files via Scan Upload

Before uploading TIFF files to the evasys system, you have to scan the paper questionnaires with a suitable document scanner in the manner described above. Save the TIFF files of your scanned forms on your local computer. Open the TIFF file and check the quality of the scan. If the scan looks very light or distorted, check your scanner settings and scan the forms again.

To upload the scanned files via the evasys interface, open the menu “Process scans” in the “Actions” menu and click on the image labeled “Scan Upload”.

Click the button [Browse…] and select the file which you want to upload to the system. Then click [Process new batch] in order to upload the file and trigger processing.

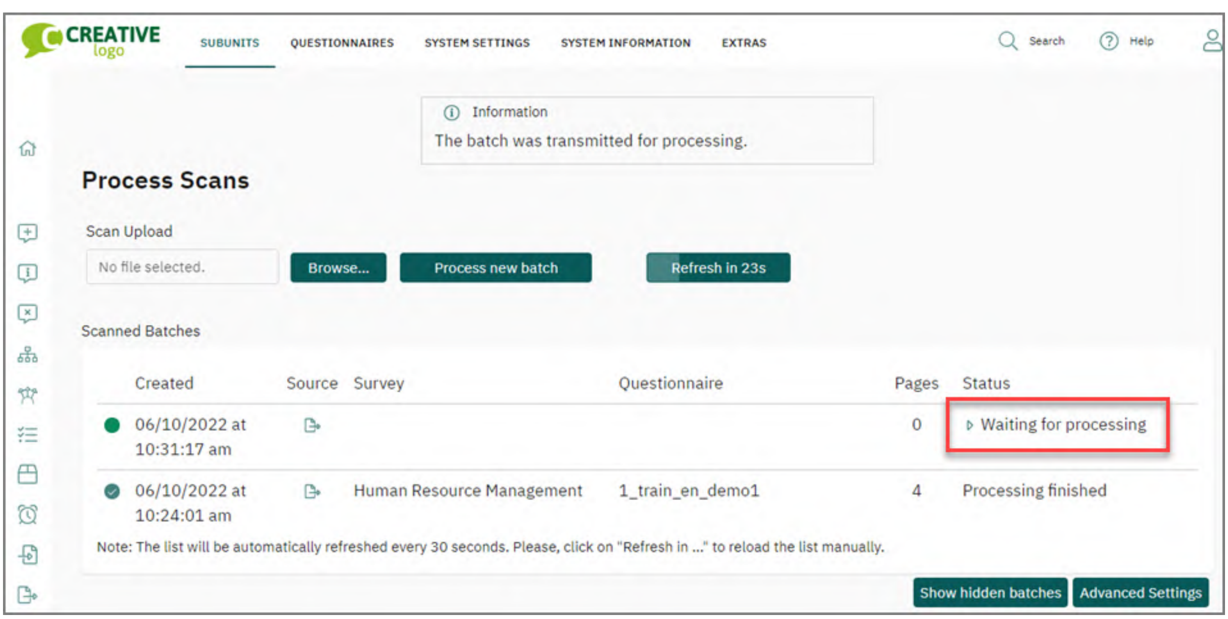


Figure 337: Upload Scan

The file will now be uploaded. In the list of processed batches, the batch will show the status “Waiting for processing”. When the forms have been recognized, the status will change to “Release batch”.

If you have activated the verification when creating the survey, then the status “Batch is waiting for verification” is displayed. You can switch directly to the verification by clicking the status.

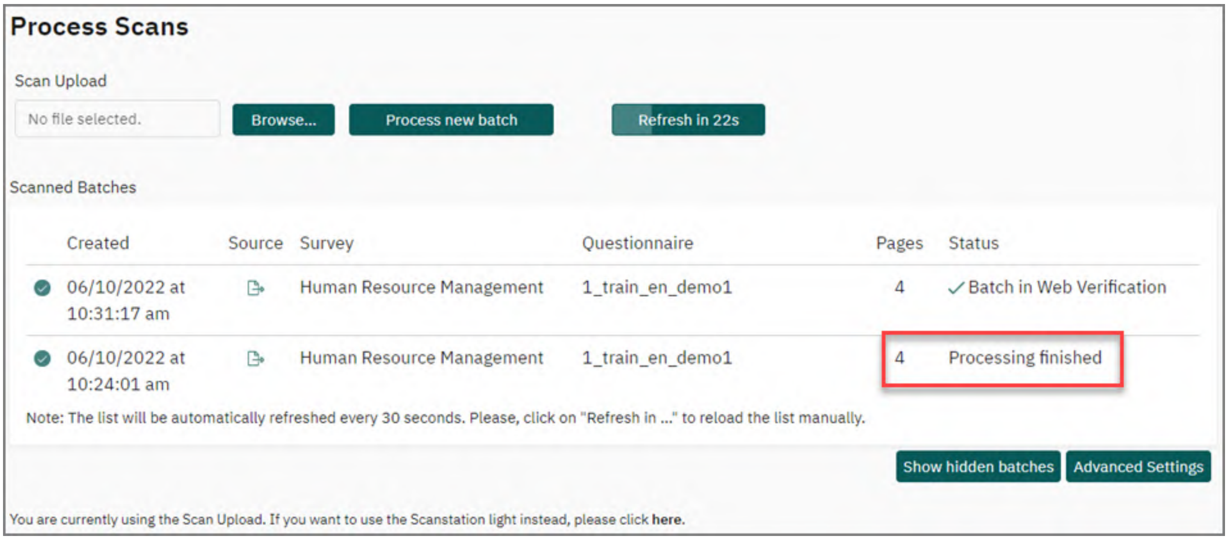


Figure 338: Scan Upload - Processing complete

If errors have occurred during processing, this is displayed in the status. In the illustration below, duplicate serial numbers were identified in the batch.

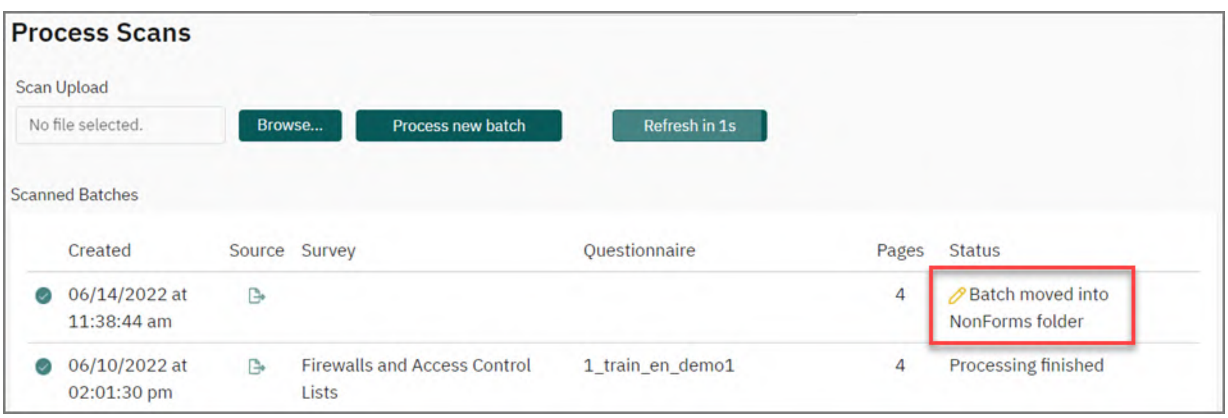


Figure 339: Scan Upload - Error

Click the status message to open a more detailed error description. In this case, the batch can now either be further processed or discarded.

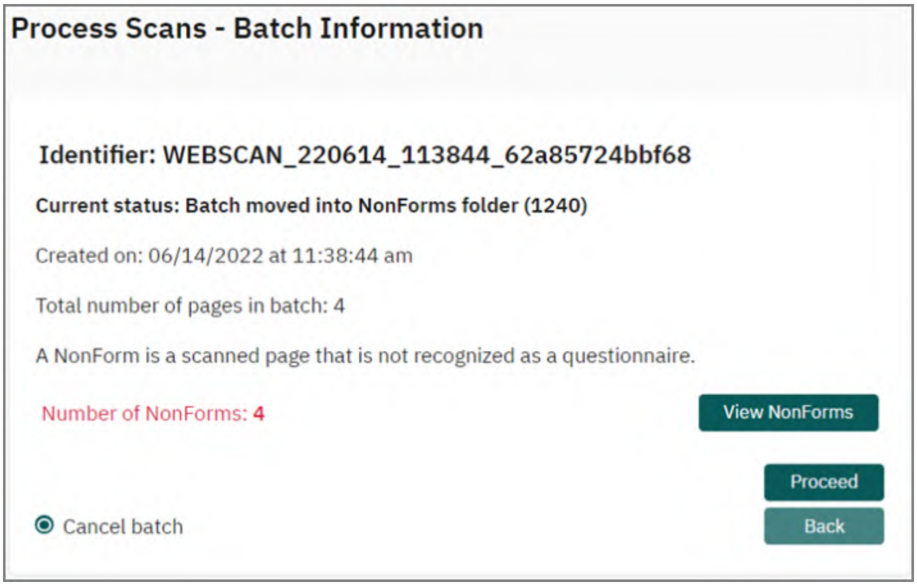


Figure 340: Scan Upload - Error status

4.2.2. Transfer TIFF files with the Scanstation light

Open the menu “Process scans” in the “Actions” menu and click on the image labeled “Scanstation light”. Now the setup file for the scanstation software will be downloaded. Please confirm the download message by clicking [OK].

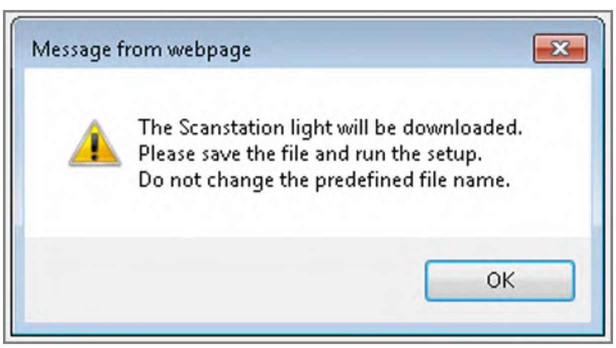


Figure 341: Download Message

Note:

Do not change the file name of the downloaded setup file, as your configuration settings are encoded in the file name. If you change the file name, the scanstation will not be operable.

Run the setup. After the installation, the Scanstation light can be started.

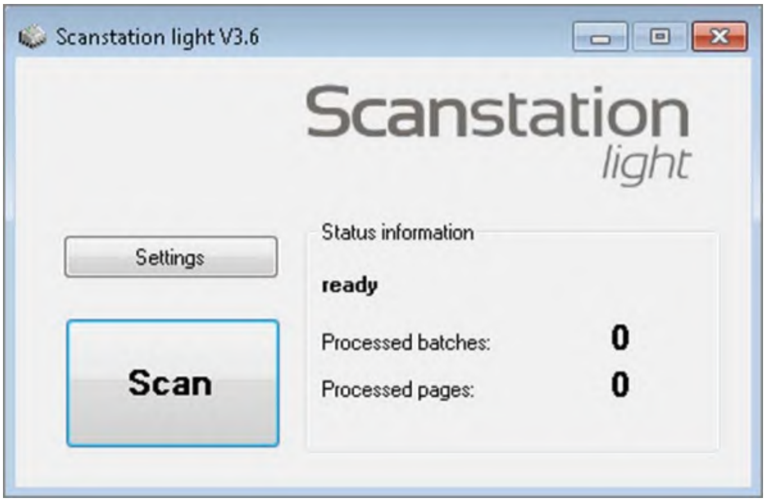


Figure 342: Scanstation light

Settings in the Scanstation light

Click the [Settings] button to open the settings menu for the Scanstation light.

The settings menu has two tabs: Scanner and General Settings.

Scanner Tab

In the Scanner tab you can configure the scanning device. Besides, you can activate automatic archiving of the scanned batches in a local directory.

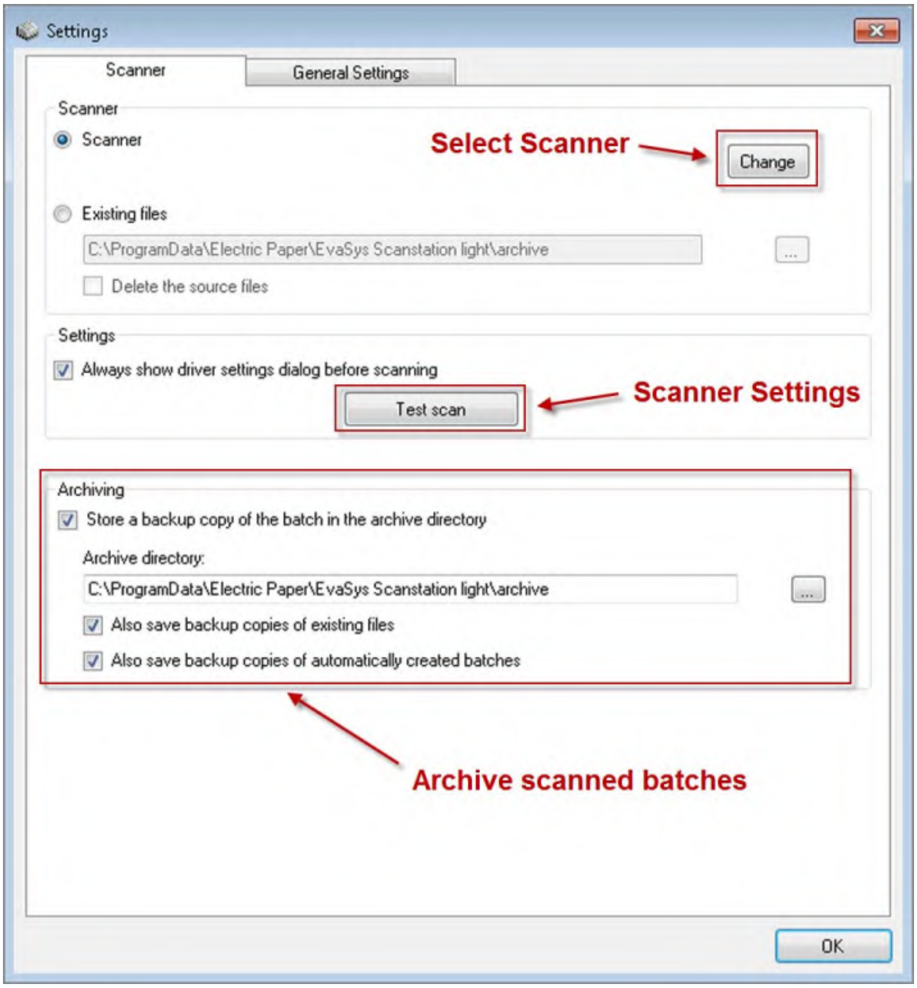


Figure 343: Scanner Tab

The document scanner should be installed before you start the Scanstation light. Via the button [Change] you can select the scanner.

Note:

The scanner must have a TWAIN interface. It must be able to produce group 4 compressed multipage TIFF files, 200dpi, black&white mode, and duplex scan should be available.

After you have selected the scanner, you can configure it via the button [Test scan]. The settings dialog looks a bit different depending on the scanning device. If in doubt, consult the scanner documentation.

The following settings are important:

- Color: Black&White (b/w)
- Resolution: 200dpi
- Page size: DIN A4
- Duplex
- Lightness slightly darker than the medium value

Further scanning options such as automatic page scaling etc. should be deactivated.

General Settings Tab

In this tab you can change the language of the Scanstation light from English to German and you can configure a check for available local disk space. All further settings affect the image processing in evasys. You can adapt the thresholds for filling degrees or overrule barcode information. They should be adjusted only in exceptional cases.

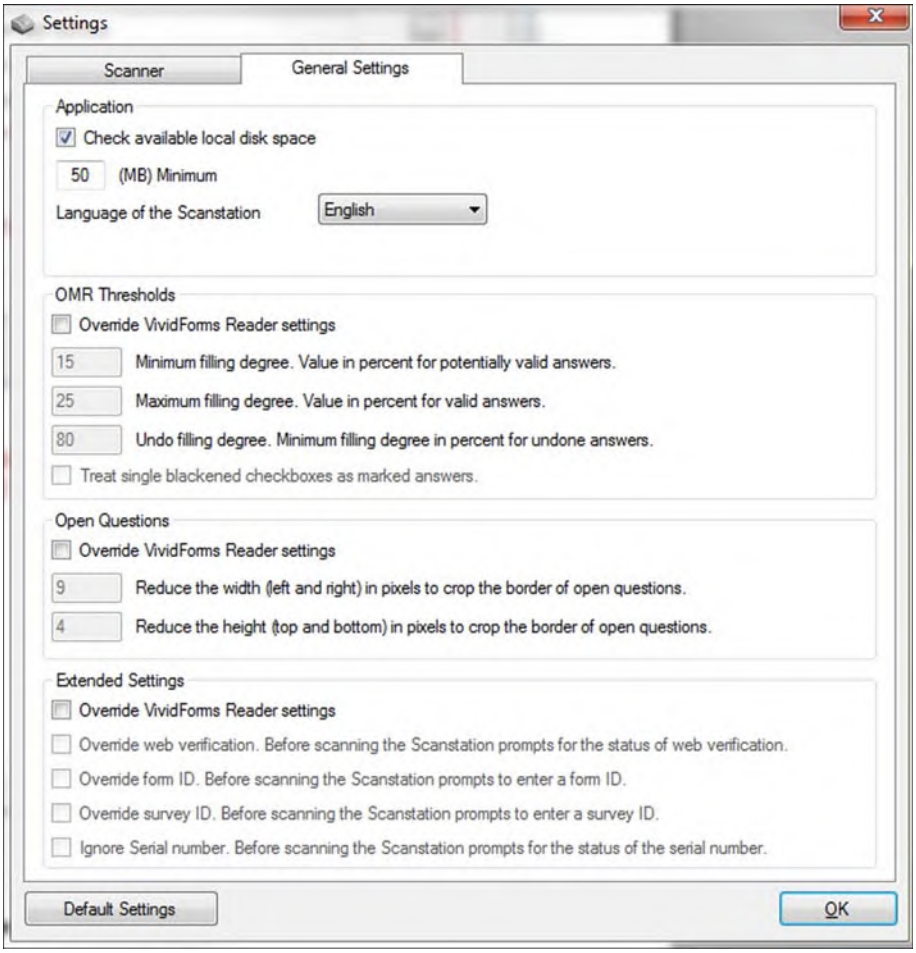


Figure 344: General Settings Tab

Scanning with the Scanstation light

Put the questionnaires into the feeder of your scanner. Then start the scanning process by clicking the button [Scan] in the Scanstation interface.

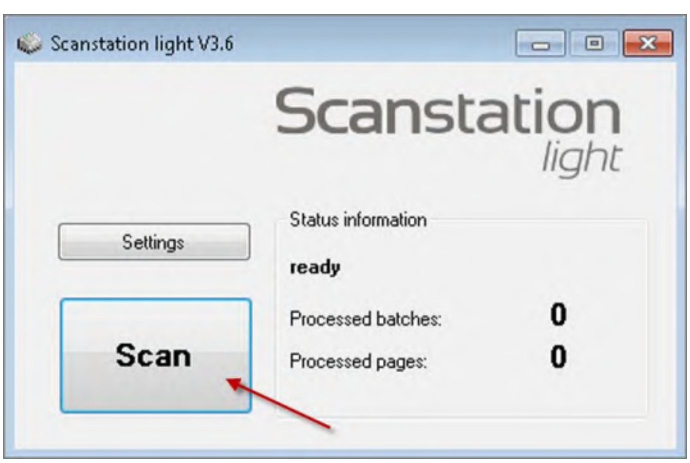


Figure 345: Start Scanning Procedure

After the scans of a batch have been scanned you are asked if you wish to scan more questionnaires (if, for example, not all pages fit into the feeder), if you wish to delete the batch (if, for example, there was a double feed or paper jam), or if you wish to release the batch (if everything went fine).

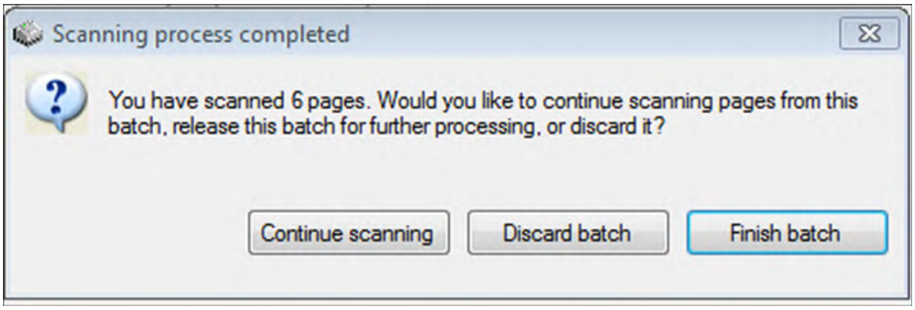


Figure 346: Complete Scanning Procedure

If the batch has been successfully uploaded, this will be shown in the status information. The systems indicates how many batches and pages have been processed. Blank pages are removed automatically.

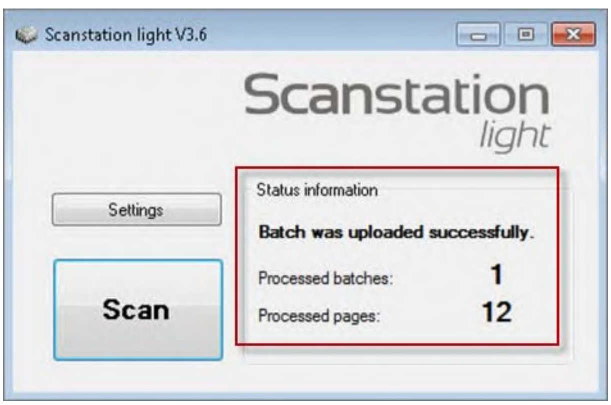


Figure 347: Batch successfully scanned

The batch is now shown in the batch list in the Process scans menu.

4.2.3. Advanced Settings

If the scanning device cannot be configured in a suitable way and if your scans are too light or dark or cannot be created in black & white mode, then you can adapt the OMR thresholds and the processing mode in the advanced settings of the Scan Upload. To do this, click [Advanced Settings].

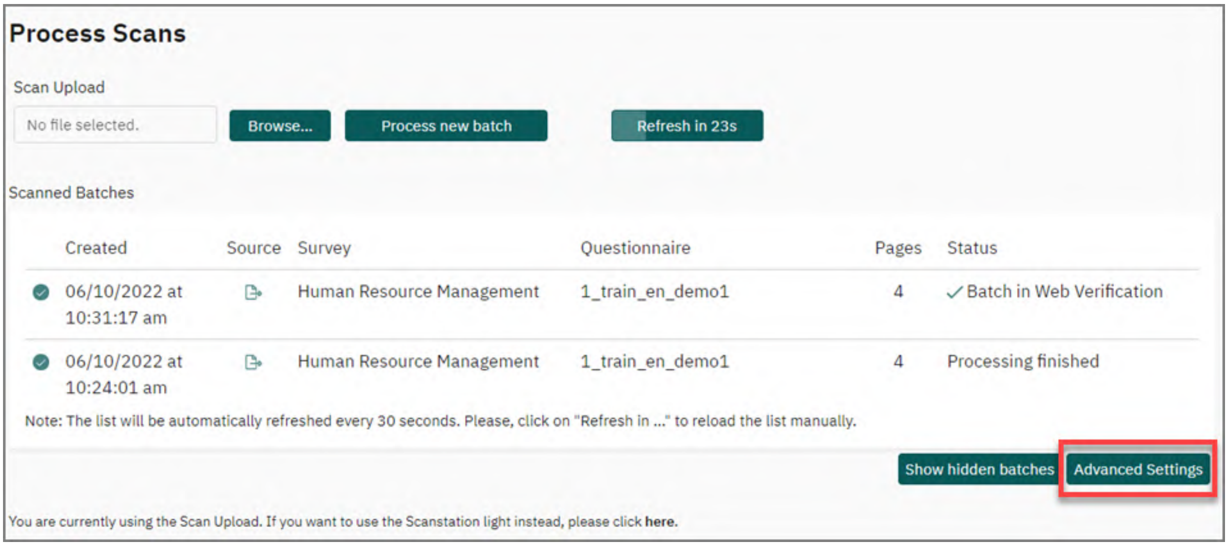


Figure 348: Open Advanced Settings

By adapting the OMR thresholds you can optimize the reading results for too light or dark scans. If your scans are too light or dark, select the corresponding option from the drop-down list.

If the scanning device is not able to produce black & white images, you can switch to grayscale processing. This should only be done if there is no way to configure the scanner for black & white scanning. In this case, activate the corresponding option and set the brightness manually. Check the results with the help of a test scan.

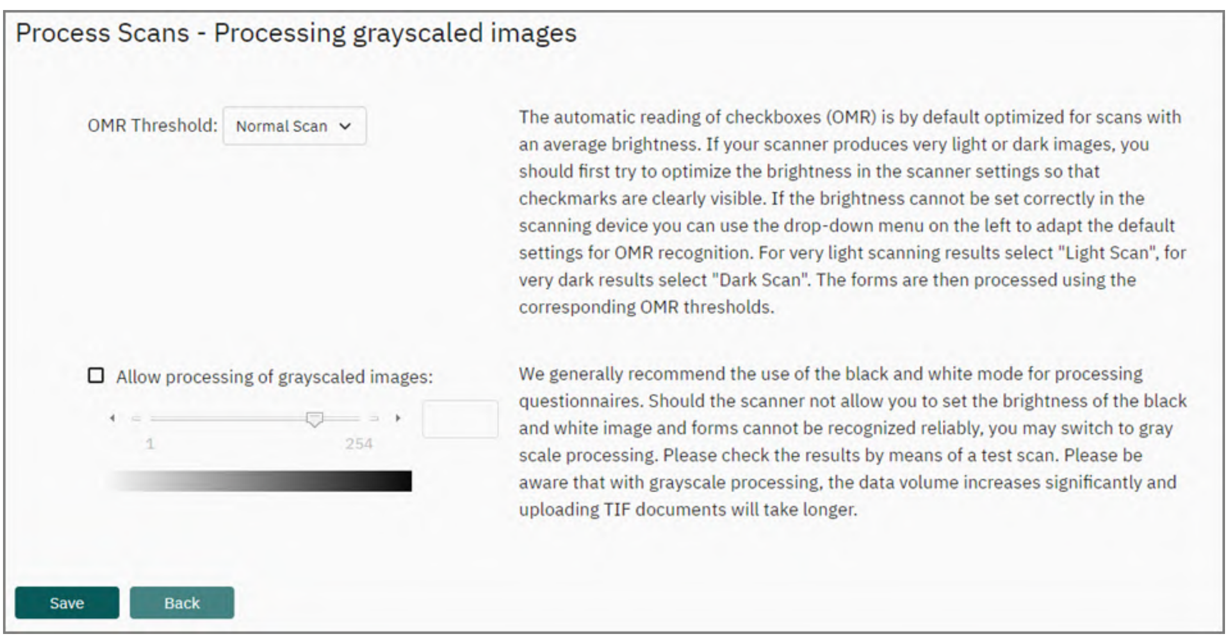


Figure 349: Advanced Settings

Note:
These settings should only be adapted in case of absolute need. Please always try to configure the scanner first.

4.2.4. Change the Transfer Method

You can change the transfer method of your scanned paper forms at any time. To do this, click on the link below the batch list. You will then be redirected to the selection page for the transfer method.

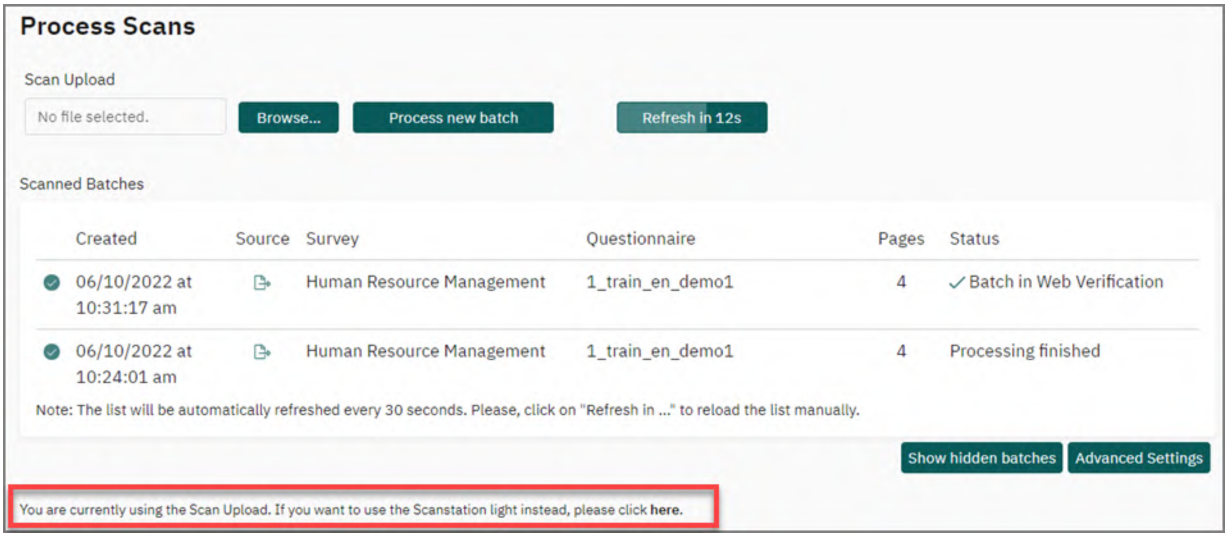


Figure 350: Change the Transfer Method

4.3. Automatic processing of the sheets

The scanned batch is processed automatically using the VividForms Reader. This usually runs as a service on the evasys server and does not need to be explicitly started. As soon as questionnaires are scanned and uploaded in the evasys system, they are automatically evaluated by means of barcode and OMR reading. The procedure is described briefly below.

Barcode Recognition

On the cover sheet as well as the pages of the questionnaire there is a process number in the form of a 2D barcode. The barcode also contains information about the type of form being used.

OMR Recognition

Answer box fields as well as open questions are processed using so-called OMR Recognition (OMR = Optical Markup Recognition). In a defined capture zone the mark is scanned. Using a predefined threshold the system decides whether a check mark is valid or not or whether a completely filled in box is to be considered a correction or not. Open question fields are also searched for a significant marking and then saved as an image file. These image files are later integrated into the PDF reports.

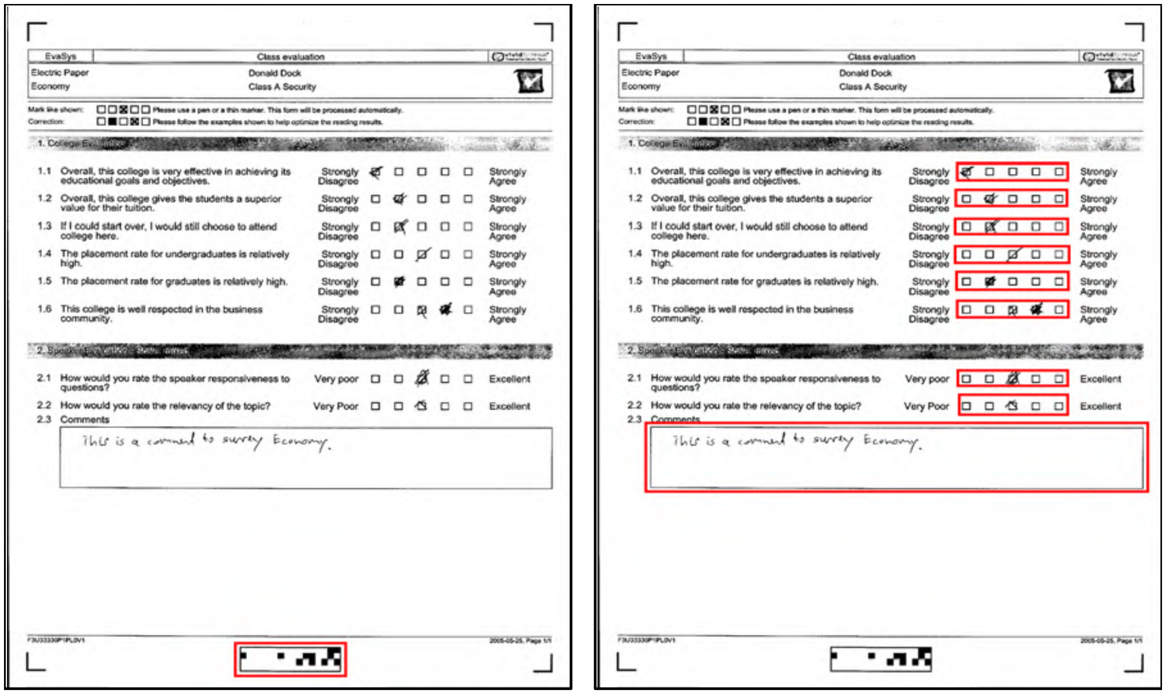


Figure 351: Barcode and OMR Recognition

Interpretation Rules for Automation

In the interest of maximizing automation there are decision rules to handle exceptional cases which would normally require user interaction via VividForms WebVerifier. These are:

- If more than one check has been made, where only one is permitted then the check will be interpreted as “not marked”.
- If a check was detected but is under the threshold, (e.g. because the box was unintentionally marked) then it is considered as “not marked”.
- Even if you were to view questionnaires by sight it would not always be possible to determine in every case where two checkmarks were made which was intended as the correct response by the respondent.

Processing in VividForms Reader

Processing forms with the VividForms Reader is explained in detail in the Technical Guide which you can download from the „System Information/ Manuals“ menu.

4.4. Verification

The verification is used in order to correct checkboxes that have not been clearly read. The prerequisite for its use is that the verification is activated when generating a survey. In the drop-down menu there are two options available: If the option “All” is selected, all questions where the fill levels are borderline or where none are filled, or where more filled boxes than permissible are recognized, have to be checked. If the

“ICR” option is selected, only questions with handwriting recognition are displayed for correction.

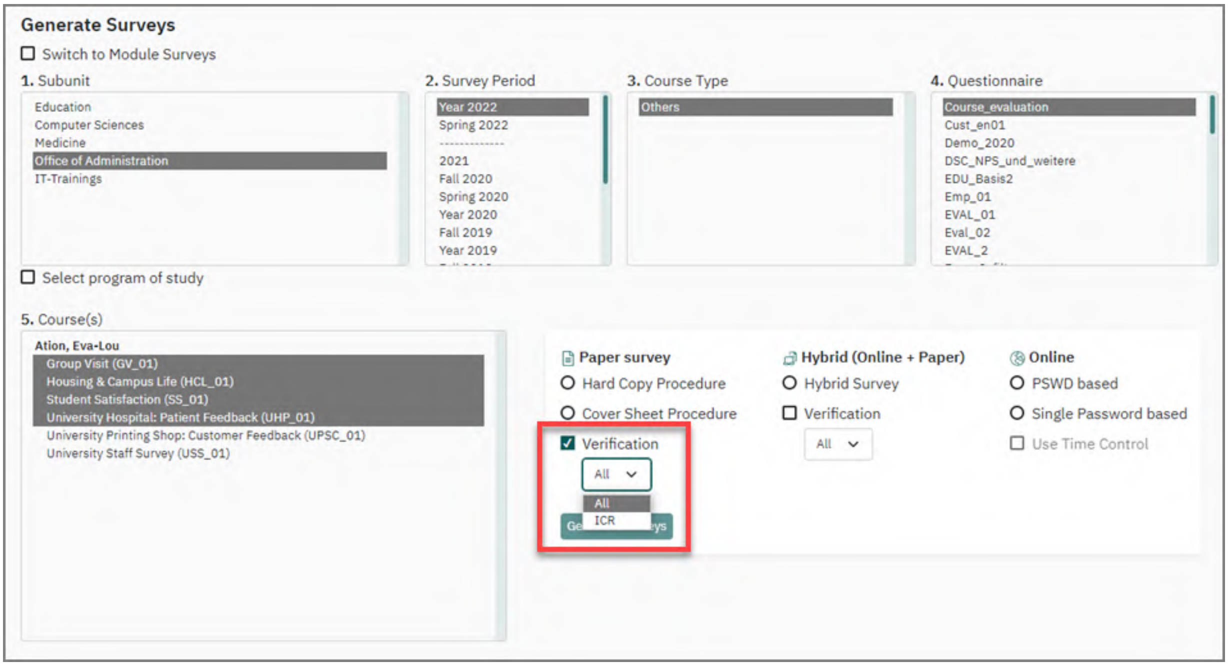


Figure 352: Verification: Activate Verification for Surveys

In order to use the WebVerifier, as an administrator or subunit administrator, change to the role of “Verifier”. Alternatively, a separate user role of the user type “Verifier” can be created. This has the advantage of allowing the task to be delegated to other persons.

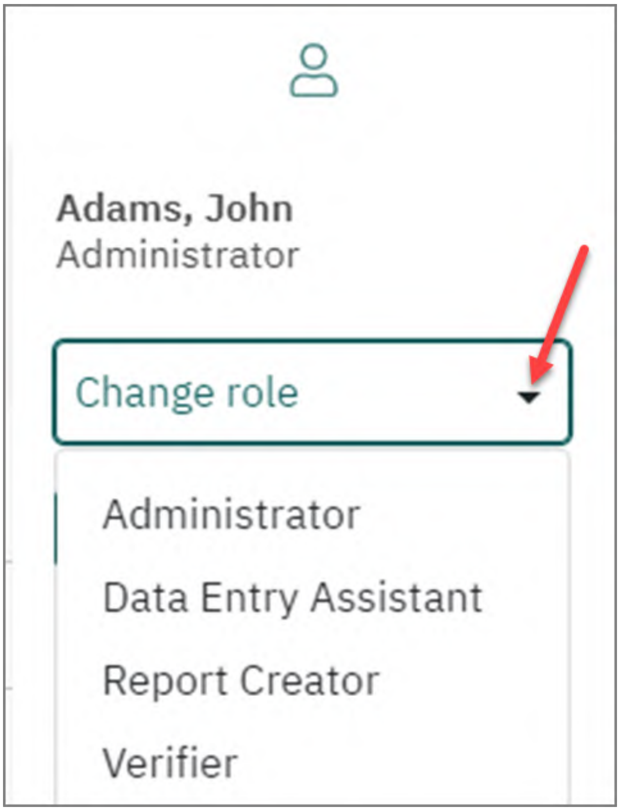


Figure 353: Verification: Change to the Verifier Role

After login, three different views are available, which can be changed with a click on the symbol: Batch View, Survey View and Form View.

Note:
If the verification is activated, the batch will automatically appear in the verification table. Even if there is nothing to verify, you still need to release the batch using the yellow pen icon.

4.4.1. Batch View

All batches needing to be verified are shown in a table.

The table is made up of the following columns:

- Batch ID: Serial number of the batch
- Time: Scan time of the batch
- Duration: Processing time of the VividForms Reader in seconds
- NonForms: Number of unidentified pages in a batch
- Scanstation: Name of the scanstation
- OMR errors: Number of checkboxes not found
- Sheets: Number of all pages
- In progress: Shows whether other users are already processing the batch

- Status: Corrections already processed/Total corrections
- Cover Sheet: Display cover sheets
- NonForms: Delete all NonForms
  Display NonForms
- Filling Degrees: Display filling degrees in original PDF
  Export filling degrees as CSV file (only when activated in the evasys Settings)
- Verification Process batch
  Verify automatically
  Delete batch

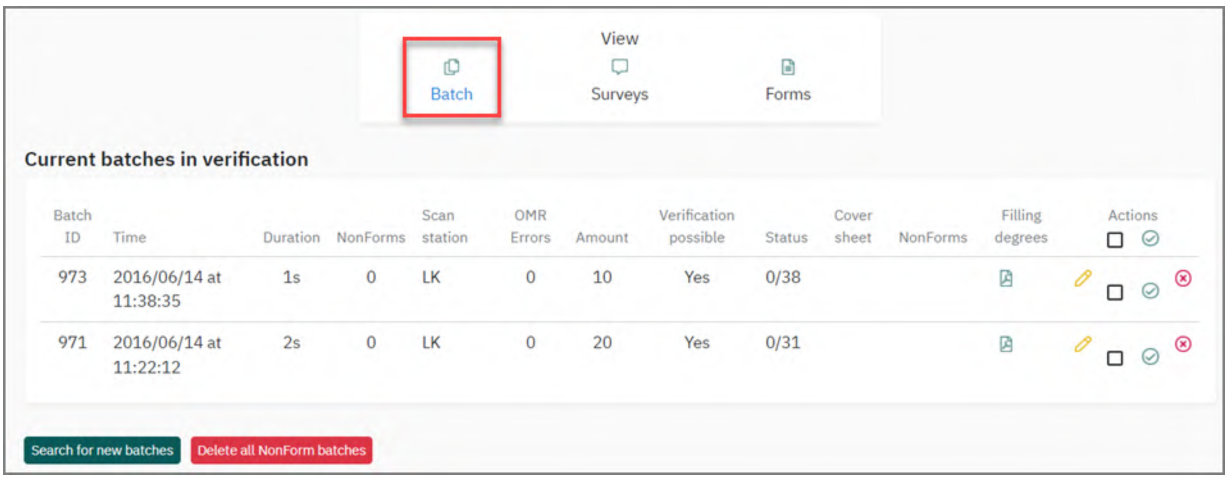


Figure 354: Verification: Batch View

4.4.2. Survey View

In this view you will see all of the surveys that still need to be verified. Because surveys can be scanned in a number of batches and a VividForms batch can have a number of surveys in it the number of surveys is rarely identical with the number of batches.

The table is made up out of the following columns:

- Survey: Name of the survey
- Form: Short name of form
- Sheets: Number of recognized forms
- In progress: shows whether other users are already processing the batch
- To verify: Number of corrections
- Cover Sheet: Display cover sheets

- NonForms: Delete all NonForms
  Display NonForms
- Verification Process batch
  Verify automatically
  Delete batch

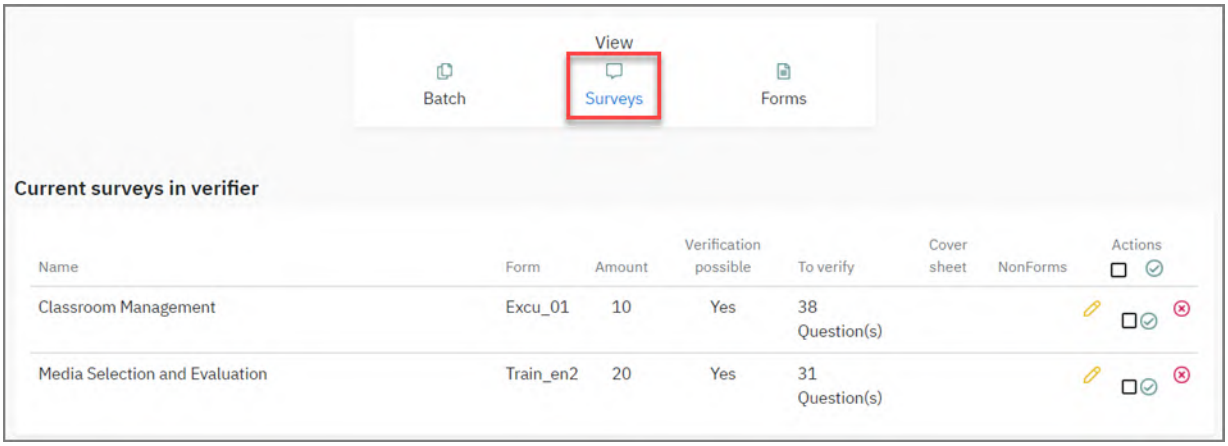


Figure 355: Verification: Survey View

4.4.3. Form View

The form view gives you an overview of the questions that remain to be corrected at the form level. A form is normally made up of a number of surveys, which are scanned in a number of batches.

The table has the following columns:

- Form: Short name of the form
- Description: Title of the form
- Pages: Number of pages of the form
- Sheets: Number of recognized forms
- In progress: shows whether other users are already processing the batch
- To verify: Number of corrections
- Cover Sheet: Display cover sheets
- Verification Process batch
  Verify automatically
  Delete batch

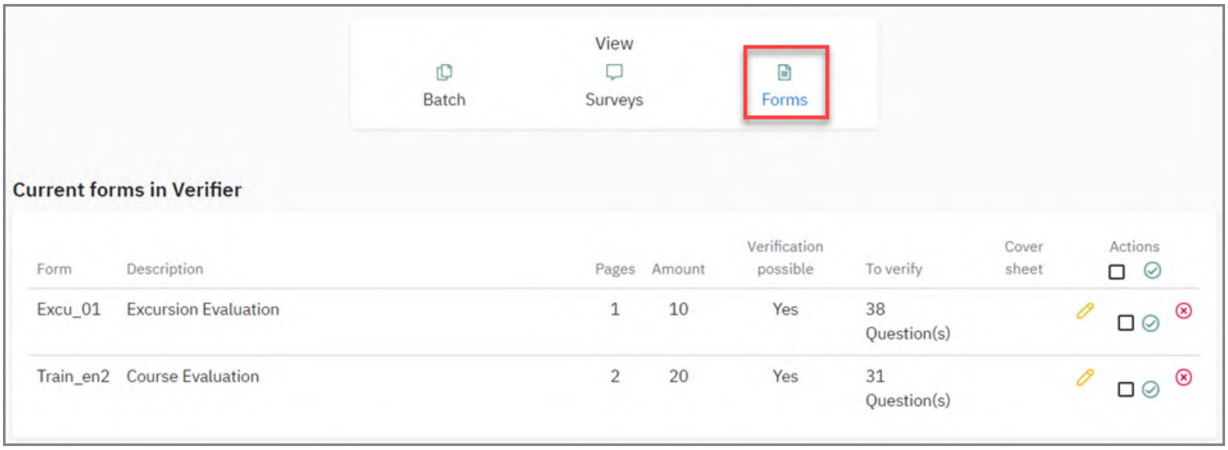


Figure 356: Verification: Form View

4.4.4. Carrying out the Verification

As soon as you click on the “Process” symbol in a view you will be automatically taken to the correction view. In the correction view there is always a question to be verified. You work through the questions one by one until you are finished verifying all the questions in the batch (or in the survey or in the form).

Figure 357: Verification: Processing Status and Messages

The current processing status is shown in a bar in the upper left corner of the screen. The green area symbolizes the questions that have already been corrected, while the red area shows the number still to be corrected. The number of questions is also shown.

Left of the bar graph you can see the status messages from VividForms Reader.

The three most common alarm signals are:

- The fill value of the response field is borderline.
- More than one checkbox has been checked for this question.
- The fill value of the checkbox field exceeds the upper fill value (cancel checkmark)

Below the header you can see the original image box and below that the correction view. In the correction view you can see the solution VividForms Reader suggests. When the system has detected a filling degree, the checkbox is marked green.

A click on the image box enlarges it in a separate window.

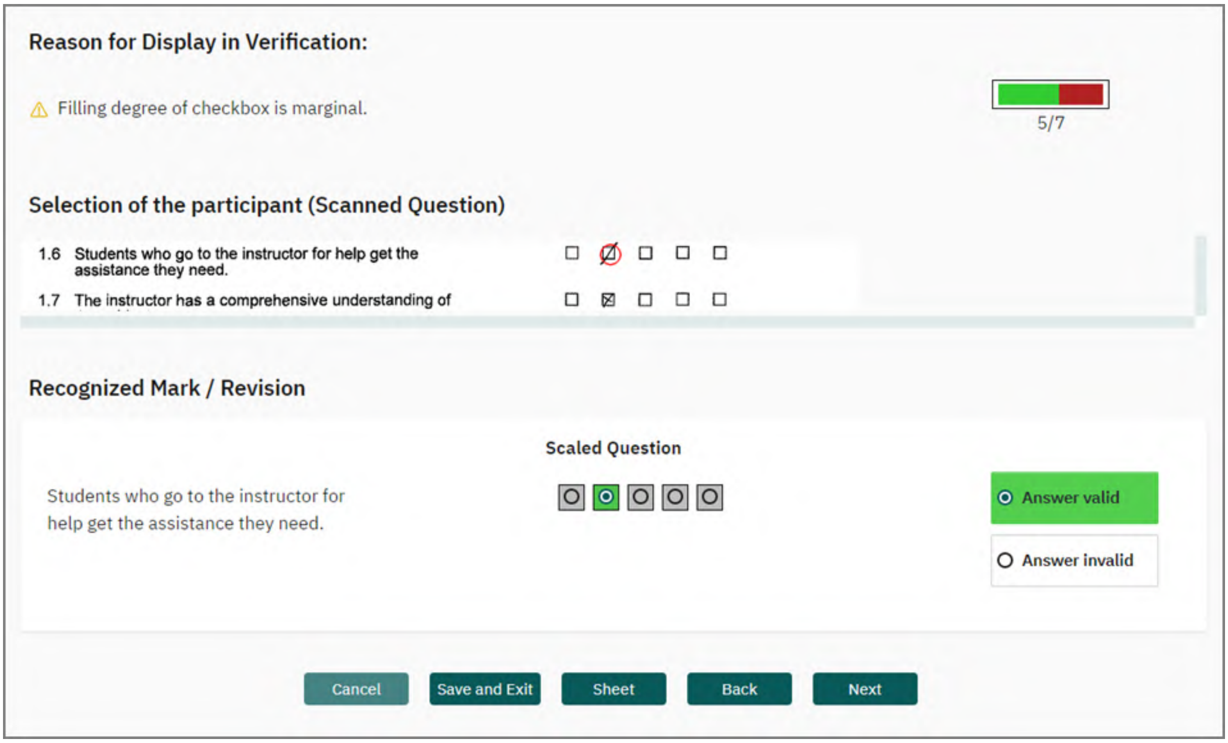


Figure 358: Verification: Correction of a Scaled Question

In the figure above you can see a scaled question with a fill value that is not above the threshold for positively identified checkmarks.

This suggestion can be corrected by selecting a checkbox. This way, the answer is automatically set to “valid”.

Figure 359: Verification: Navigation

[Sheet] – Displays the complete sheet in a new window. The question being processed is circled in red. This view can be helpful for seeing the whole context.

By clicking on **[Back]** you can move backwards within a verification batch, so as to edit a verified question again.

In addition, the following buttons are available:

[Cancel] – The correction is canceled. Please note that all corrections made since the last save will be lost.

[Save] – The current corrections including the open view are saved. Then you will be automatically taken back to the view you were in before going to the correction view. The verification can be continued immediately or at a later date. Saving the verification is necessary, for example, when you interrupt your work.

By clicking on **[Next]** at the bottom of the view the correction is adopted and you are taken automatically to the next question.

If ICR questions are verified (questions with automatic handwriting recognition), the securely read characters are highlighted in white and the insecurely read characters in yellow. In this way, the characters that must be corrected are quickly identified.

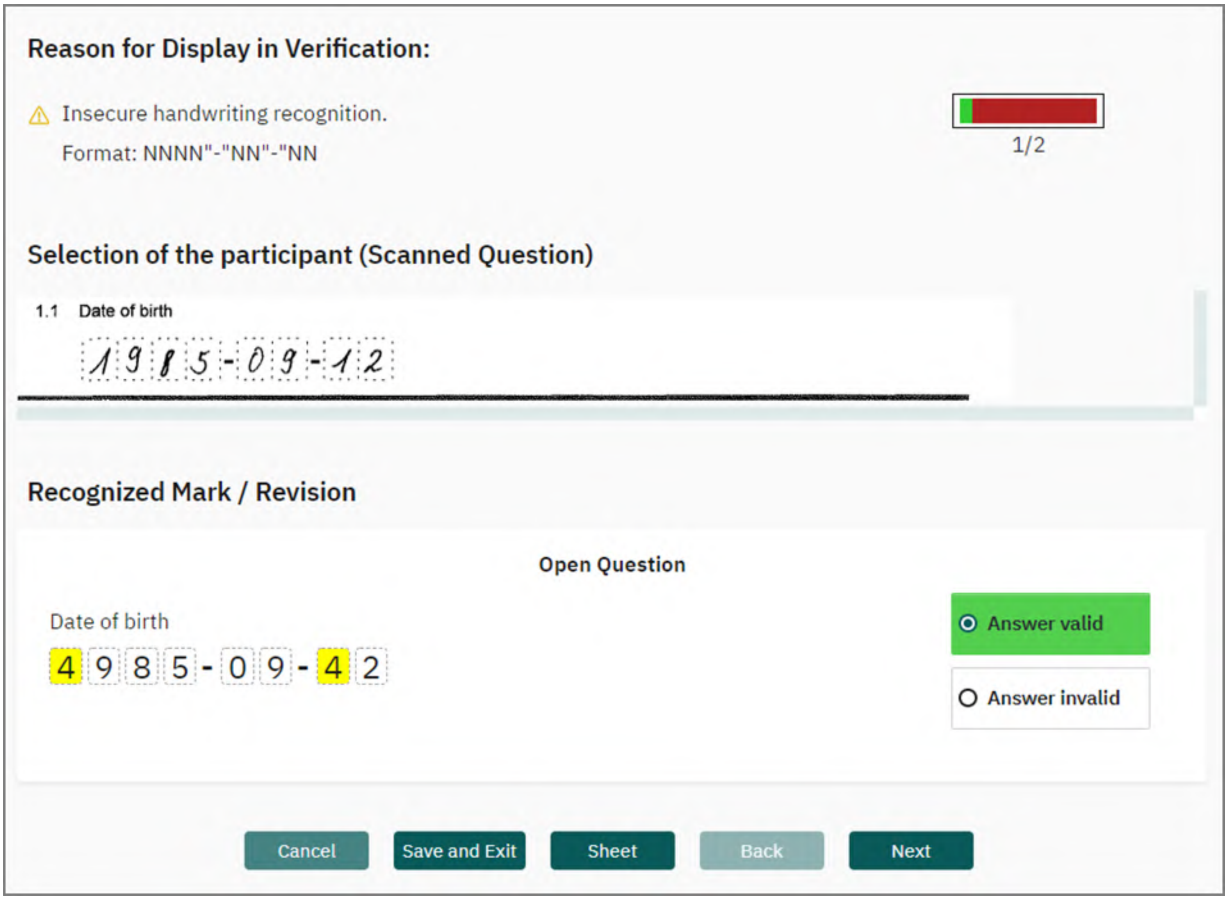


Figure 360: ICR question in the verification

Note:
If you create a survey for a questionnaire that contains open questions with handwriting recognition, verification is automatically activated. You can deactivate this if required. We recommend that you always carry out a verification to ensure the quality of the reading results.

When you have finished verifying a batch the results are automatically saved and the overview is displayed. The verification is however completed when the NonForms in a batch have been deleted. You can do this by using the NonForms view or the button [Delete NonForms]. When the NonForms are deleted after completing the manual verification then the verification must be completed by clicking on the button [Process batch]. Now all the results of the batch are submitted to the database and the evaluation can be downloaded from evasys.

4.4.5. Automatic Verification

To accelerate the process of verification, a number of cases can be verified automatically in the WebVerifier. The prerequisite for automatic verification is that the relevant option in the systems settings is activated ("System Settings/evasys Settings/Functions/Automatic Verification").

In each of the three views (batch, survey and form view) a checkbox appears in the column "Verification" as well as an icon for the automatic verification. To verify a stack automatically, activate the checkbox and click on the corresponding icon. If multiple stacks are to be automatically verified simultaneously, activate the checkboxes for all the corresponding batches/surveys/forms and then click in the header on the icon for verification. By selecting or de-selecting the checkbox in the header, you can select or de-select all stacks/surveys/forms simultaneously.

Figure 361: Verification: Activating Automatic Verification

After clicking on the button a selection window opens, by which the settings for the verification can be defined.

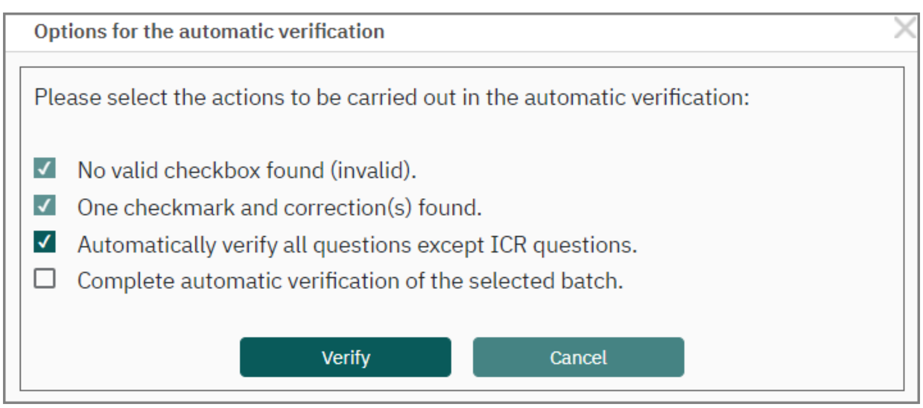


Figure 362: Verification: Options for automatic Verification

The following options are available:

- No valid checkbox found (invalid): All cases, in which no valid checkbox is found for a question, are determined invalid. Exception: Multiple choice questions will not be considered for technical reasons.
- One checkmark and correction(s) found: All cases, in which a checkmark and one or more corrections is found are automatically determined valid with the corresponding checkmark.

- Automatically verify all questions except ICR questions: All questions except questions with handwriting recognition will be automatically verified.
- Complete automatic verification of the selected batch: The batch will be completely verified automatically; this means the manual verification will bypassed entirely.If the batch still appears in the table, there may be remaining checkboxes. In this case, click the yellow pen again to remove the batch from the list.

The first two options can, if desired, be combined with each other. By clicking on the button [Perform Verification] the desired process is initiated and the relevant questions are filtered from the total amount of questions to be processed. For this reason, please note that individual questions must be verified using the yellow pen if you have not selected complete automatic verification.

4.4.6. Check Filling Degrees

In the batch view, the section “Filling Degrees” appears in the table. Using the PDF icon here, a PDF file can be opened which contains the scanned pages with all of the degrees of shading measured for the check boxes and open questions. If the ICR recognition (handwriting recognition) is in use, the characters read can also be viewed in this file.

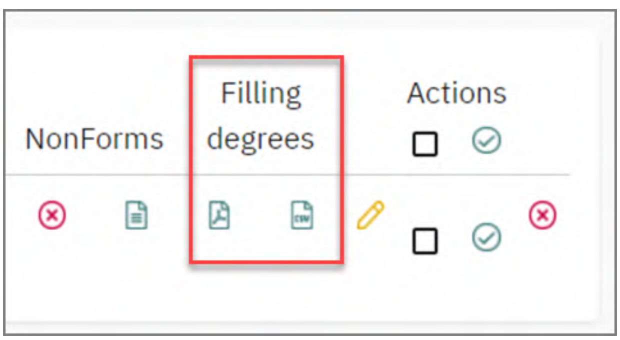


Figure 363: Verification: Check Filling Degrees

Note:
The PDF can only be opened, when the display of the entire questionnaire page is allowed for verification (Menu “System Settings/evasys Settings/Functions/Data entry assistant/Verifier: View entire original questionnaire page”).

The presentation provides a good overview of the values measured and allows for consideration of adjustments to the OMR threshold. As in this PDF file only data above the minimum degree of shading (standard 15%) is shown, the minimal degree of shading can be experimentally lowered to 1%, so as to get a clearer insight into the degree of shading of empty, unchecked check boxes. For expedient OMR thresholds it is important to keep a sufficient gap between the degree of shading of empty check boxes as well as that of “real”, only lightly checked check boxes. Please make sure that, after such an experimental scan test, the OMR threshold settings, where applicable, are returned to their original values.

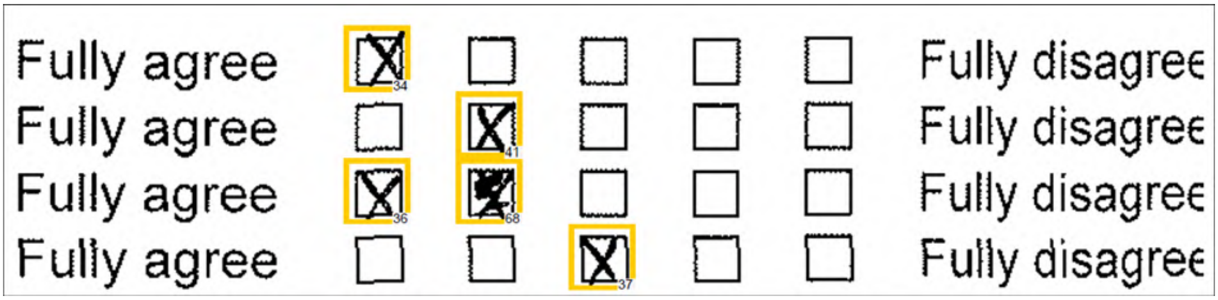


Figure 364: Verification: Filling Degrees in PDF-View

For an empirical analysis of the degrees of shading measured, the values can also be recalled from a CSV export. This feature is by default disabled, and can only be activated by the administrator via the configuration option “Maintenance/CSV export of filling degrees in the Verifier”.

The CSV file is structured in the following way:

SHEET | FORM | PAGE | QUESTION | TYPE | ROWINDEX | F1 | F2 | F3 | …

	A	B	C	D	E	F	G	H	I
1	SHEET	FORM	PAGE	QUESTION	TYPE	ROWINDEX	F1	F2	F3
2	2	293	1	3590	Single Choice	0	0	38	
3	2	293	1	3591	Single Choice	0	42	72	0
4	2	293	1	3591	Single Choice	1	0	0	0

Figure 365: Verification: CSV-Export of Blackening Degrees

Each line in the CSV file equals one line of the questionnaire. The table contains the following information (from left to right):

SHEET	Number of scanned page in the page
FORM	Internal form-ID
PAGE	Page number of a questionnaire
QUESTION	Internal question-ID
TYPE	Question type (e.g. Single Choice, Matrix Field, Scaled Question)
ROWINDEX	Indicates the line of a question; normally the row index = 0, each further question will be numerated in ascending order (1, 2, …). Open questions always have a row index = 0, even if they have more than one line.
F1, F2, F3, …	Indicates the blackening degree within checkboxes in a line from left to right; checkboxes without blackening show the value 0, for boxes with a blackening the percentage blackening degree is shown.

Table 14: Construction of the CSV file Blackening Degrees

Consequently, the figure above can be interpreted as follows: The first single choice question (3590) is a question with two answer options. The second box has been checked and shows a blackening degree of 38%. The second single choice question is a question whose answer options spread over two lines. In the first line the first box was checked with a blackening degree of 42%, the second with a degree of 72%. The following figure shows the corresponding section in the PDF file:

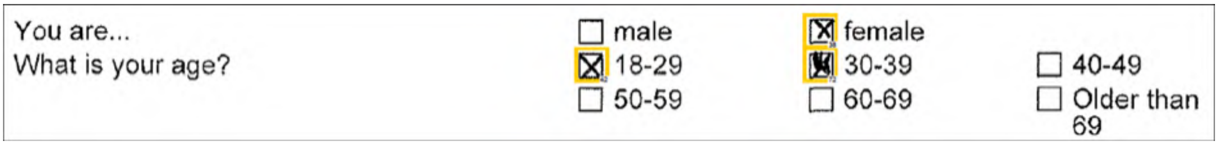


Figure 366: Verification: Filling degrees in the PDF file

Note:
Please note, that the flexible layout of VividForms Designer questionnaires can lead to displacements in the CSV file.

For further information concerning the control and adjustment of OMR thresholds please refer to the Scanstation Manual.

4.4.7. Responses to Open Questions

Responses to open questions are only displayed in the WebVerifier when the option “Handwriting recognition” was activated on creating the open question (for information on handwriting recognition in open questions see chapter 2.6.3. “Open Question” in the manual “Creating questionnaires with Vivid Forms Editor”). In this case, the results of the ICR analysis can be controlled and, if necessary, corrected with the help of the WebVerifier.

Open questions without handwriting recognition are directly transferred to the database in form of an image and, if desired, can be further processed by anonymization.

4.4.8. Keyboard Control in the Verification

There are a number of keyboard shortcuts that allow you to use the verification without a mouse. The shortcuts function in most current web browsers. The actions are done by pressing the ALT key and a further key. Please note that some keyboard shortcuts may be missing from some views.

Shortcut	Action
ALT+B	Batch View
ALT+Y	Survey View
ALT+R	Form View
ALT+N	Search New Batch
ALT+Q	Enlarge Image Box
ALT+U	Mark Question as Invalid
ALT+P	Display Sheet
ALT+C	Cancel
ALT+S	Save
ALT+F	Next

Table 15: Keyboard Shortcuts in WebVerifier

4.5. Manual Entry of Handwritten Comments

If handwritten responses to open questions should be anonymized then for each subunit concerned the option “display after manual collection” in the section “handling of handwritten texts” must be activated. You can change this in subunit details. For subunit details click on the subunit overview in column “Edit” on the icon.

The option “Display after manual collection” will hold back the answers of open questions until the captured images of the open questions have been anonymized. Until then, the PDF report only contains the answers to closed questions.

Figure 367: Activation of Manual Entry of Handwritten Comments

Create a user account of the type “Data Entry Assistant” and log in with the login data, or, as an administrator/Subunit Administrator, change to the role of “Data Entry Assistant”. A list of all surveys containing images is displayed:

Data entry of handwritten comments

ID	Survey name	Pictures waiting	Validated	Processed
Folder (Huddle - 2022 - IT Trainings)				
810645119	Leadership Development	2	0	06/10/2022 at 12:49:44 pm
Folder (Sadhi - 2022 - IT Trainings)				
612745060	Firewalls and Access Control Lists	4	0	06/10/2022 at 02:01:39 pm

Figure 368: Data Entry Assistant: Survey Overview

After clicking on the corresponding survey-ID the first image will be displayed. The contents can be entered into the text window below the picture.

Figure 369: Data Entry Assistant: Detail View

If the Data Entry Assistant is authorized to categorize answers, a drop-down menu is additionally displayed for selecting or entering categories. For more detailed information, see chapter B 4.6.4. “Categorization of surveys by the Data Entry Assistant”.

After each text has been entered, the next image will appear and a table of comments will be built up. Next to each comment there is the response frequency.

If a comment is essentially repeated, then instead of entering it again it can be highlighted, which will increase the response frequency.

If a text has been entered with a typing error then each line can be corrected by clicking on the pencil.

With the help of the option “Display the entire questionnaire page” in the upper right corner of the screen, the data entry assistant can, if necessary, display the entire questionnaire page containing the image. In this way, texts can be fully acquired, even if the participant has written outside of the box. If necessary, one can even zoom in, making hard to read text more legible.

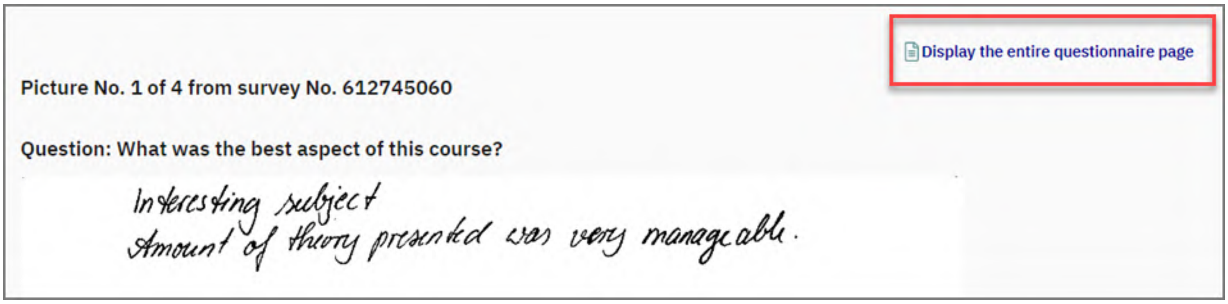


Figure 370: Data Entry Assistant: Display the original scanned page

If you do not want the data entry assistant be able to see the entire page of the form, this option can be deactivated in the evasys Settings (“System Settings/evasys Settings/Functions/Data entry assistant/Verifier: View entire original questionnaire page”).

Hint:
The capturing of handwritten comments can be accelerated if the following key combinations in the browser are not already in use: Alt + S (to save), Alt + C (to cancel) and Alt + R (to replace).

If the data entry assistant has already entered answers to open questions, the system will only display those answers again that are relevant to the question currently being displayed. For this reason, not all of the answers already entered are displayed.

To avoid having to type often recurring words such as for example course or lab course, you can create a list of placeholders and extend it as needed. A placeholder may not be contained completely by the replacement text, or represent an entire word. Example: Course may not be abbreviated to C, but may be abbreviated to CS. We recommend using special characters as a prefix for placeholders, for example *CS.

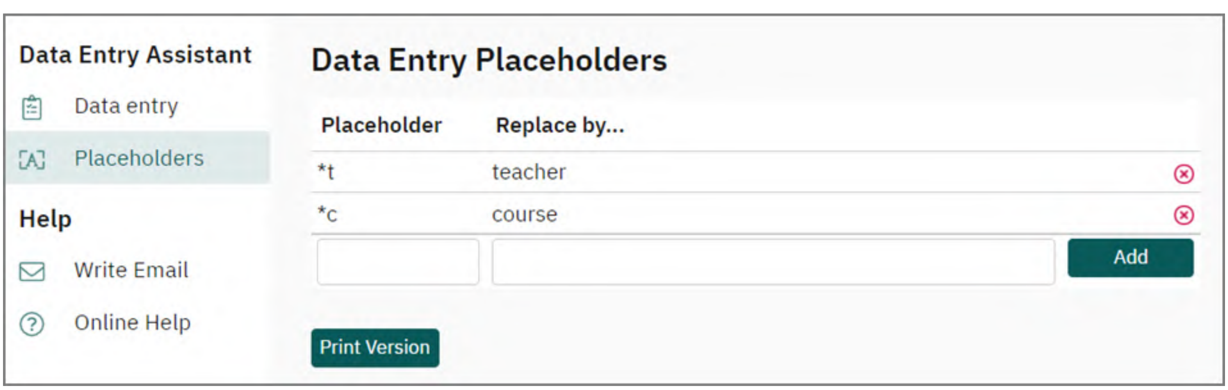


Figure 371: Data Entry Assistant: Placeholder

If a statement that has already been classified is entered along with a new statement, then the existing statement can be marked with a checkmark and only the new statement need be entered. Both statements will be registered and counted.

After the last image has been entered, a corresponding note appears and, by clicking [Survey list], the data entry assistant can now change to the tracking information on the surveys that still need to be processed.

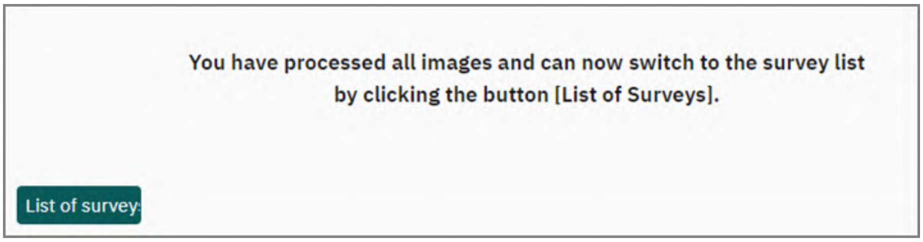


Figure 372: Data Entry Assistant: Close a Survey

If desired, the data entry assistant can send the PDF report to the owner of the survey (usually the instructor) after the completion of the data entry with the button [Send PDF report]. For this, the corresponding function must be activated in the configuration ("System Settings/evasys Settings/Functions/Data Entry Assistant: Sending a report to the instructor").

Any single survey, whose answers to open questions have already been entered by a data entry assistant is protected, and cannot be simultaneously edited by others. In this way, disruptions caused by the unseen concurrent editing of data are avoided.

4.6. Categorization of open questions

- Availability and access rights
- Administrating categories
- Categorization of surveys by the Administrator and Subunit Administrator
- Categorization of surveys by the Data Entry Assistant
- Categorization of reports by the Report Creator

If desired, the answers to open questions can be categorized, i.e. a response to an open question can be attributed to one or more categories. The open question is thus flagged. In this way, such categorized open questions can be displayed analogue to closed questions in a bar chart for the assigned answer options.

This function is available both for paper and for online surveys, and can be used independently of the data entry. It can be carried out in principle by the following users:

- Administrator and Subunit Administrator (all surveys)
- Data Entry Assistant (only paper surveys)
- Report Creator (created reports)

- Active instructor/trainer project manager (their own surveys)

The administrator or subunit administrator can administrate availability and access rights for the other users.

Note:
Please note that the bar charts for the categorization are only displayed in PDF reports of surveys or reports for which categorization has been specifically undertaken. When compiling surveys in the Report Creator, the categorizations of individual surveys are not considered, i.e., the categories are not taken on from the underlying individual reports.

4.6.1. Availability and access rights

The option to categorize open questions is activated by default for the administrator and subunit administrator; it is initially deactivated for all other users. If the function is not desired it can be completely deactivated at "System Settings/evasys Settings/Functions/General/Categorizing the Answers to Open Questions".

For Data Entry Assistants, Report Creators, and users of active accounts, you can initially specify via a configuration option whether the categorization function should be available or not. The function can be activated with the following buttons:

- System Settings/evasys Settings/Functions/General/Data Entry Assistant: Categorizing the Answers
- System Settings/evasys Settings/Functions/General/Report Creator: Categorizing the answers to open questions
- System Settings/evasys Settings/Instructor Accounts/Categorizing answers to open questions

In user characteristics, you can specify for all Data Entry Assistants and Report Creators (i.e. for users with access to the centrally collected survey data), whether they may only use the categories centrally specified by the Administrator or Subunit Administrator for categorization, or if they are permitted to create categories themselves. For Data Entry Assistants this function is activated by default when a new user account is created. For Report Creators it is deactivated.

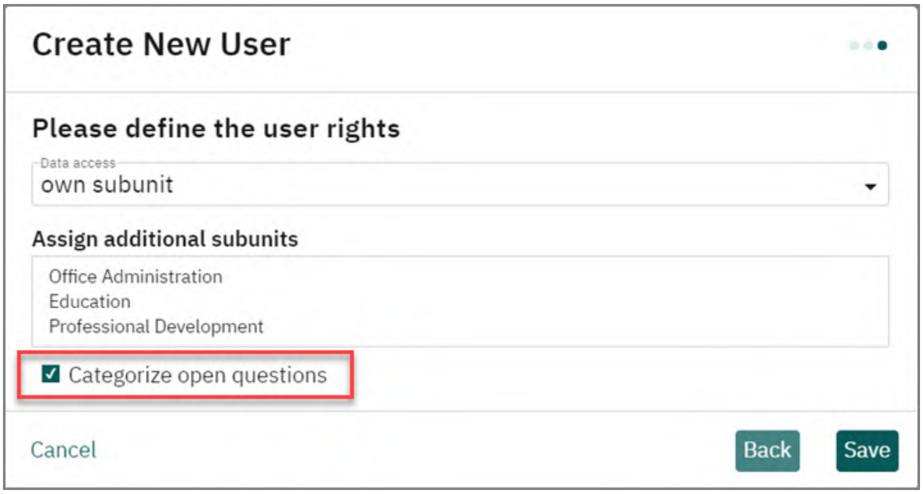


Figure 373: Categorization rights of Data Entry Assistants and Report Creators

4.6.2. Administrating categories

The Administrator and Subunit Administrator have the option to specify categories for individual questionnaires which are then displayed during the later categorization. The administration of the categories is located in the questionnaire details at "Advanced settings/Categories for open questions". Please note: The menu is only displayed when your questionnaire contains open questions!

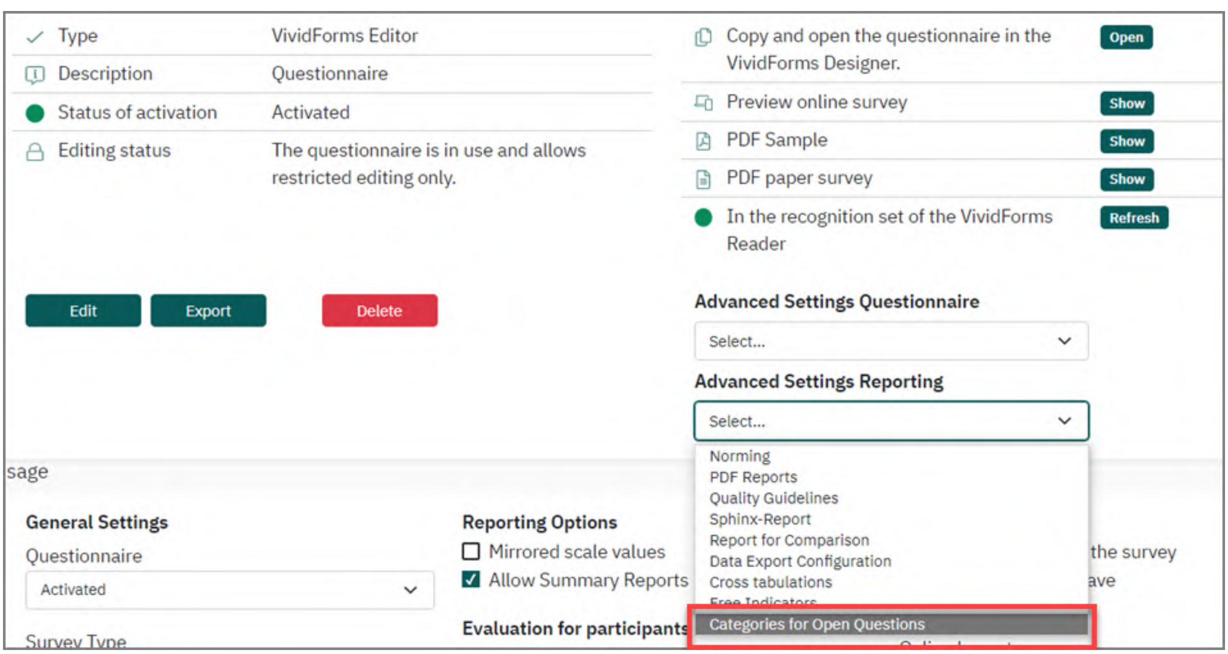


Figure 374: Questionnaire details - Administering categories

After clicking [Edit], select the open question from the drop-down menu in the subsequent view for which you would like to store categories. Then click [New category], enter the name of the category and click [Save] to create the category. In this way you store all the categories required.

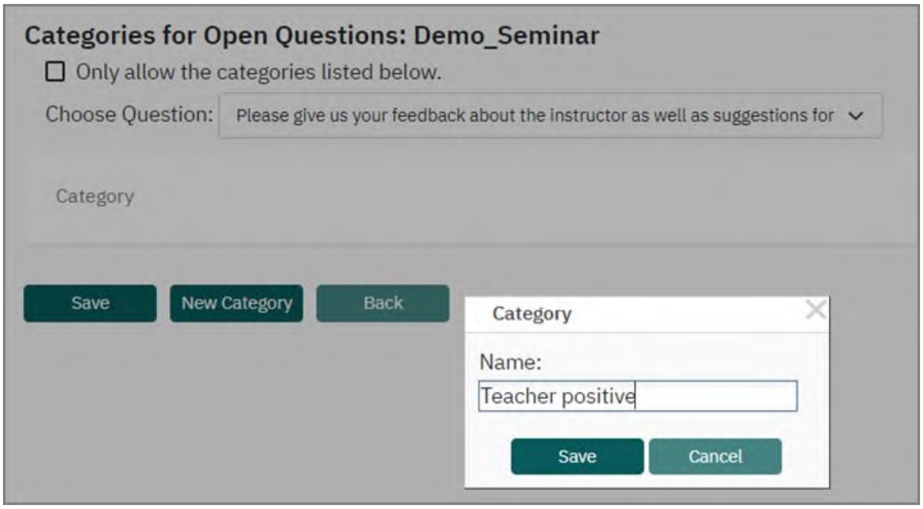


Figure 375: Saving categories

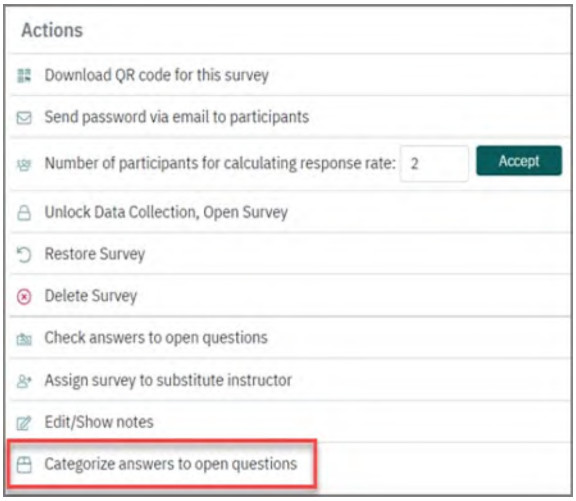
You can extend, change, or delete categories at any time retrospectively. If you change or delete existing categories retrospectively, this has no effect on already assigned categories in existing surveys, which remain unchanged for the survey. In contrast, categories that have not yet been assigned will be changed or deleted.

If you activate the option "Only allow the categories listed below", users can only choose from the predefined categories during the categorizing process.

You cannot freely add your own categories. Please note that in the case of module surveys the setting only applies if the option is activated for all module questionnaires.

4.6.3. Categorization of surveys by the Administrator and Subunit Administrator

The Administrator or Subunit Administrator can categorize individual surveys. There are two ways of opening the categorization menu: Via the survey list by clicking the corresponding symbol in the “Actions” column, or via the survey details. The menu item “Categorize answers to open questions” is available here in the “Actions” area.



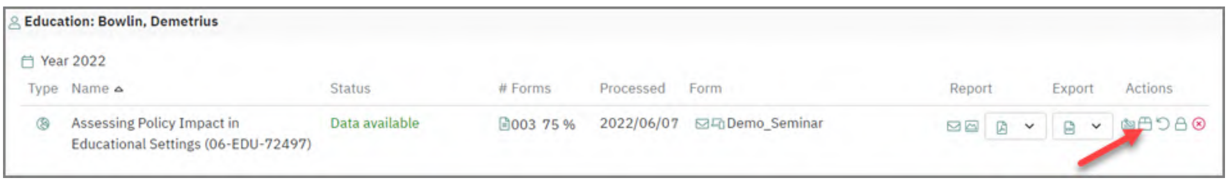


Figure 376: Categorization: Access via Survey Details or List of Surveys

An overview of the open questions on the sheet is opened. If the data entry and categorization for the survey has already been conducted, the captured texts and the associated categories are displayed. If no data collection has been conducted, only the image sections are displayed. The (subunit) administrator can now undertake the complete categorization by himself.

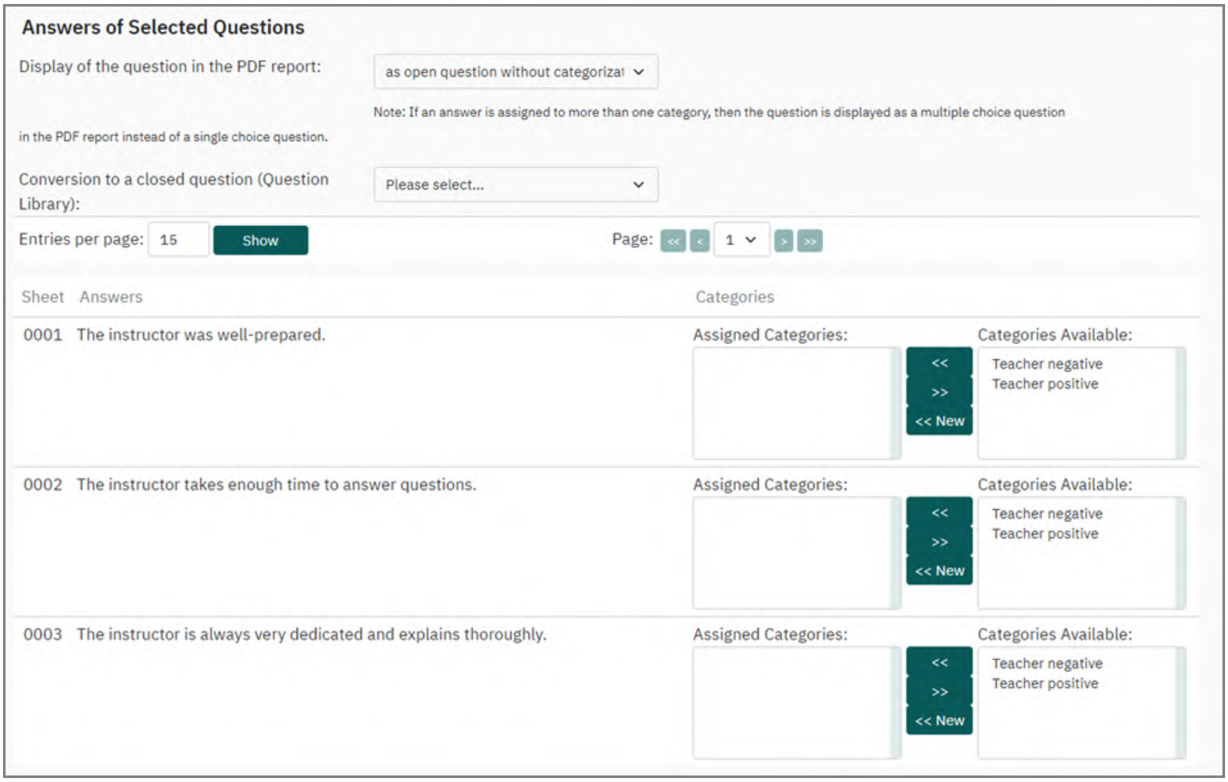


Figure 377: Categorization mask in the overview

In the upper drop-down list you can select the question you want to do the categorization for. By clicking [Select] the overview of answers opens. To assign a category select the category and transfer it into the section Categories assigned by clicking the arrow button. Categories which have been wrongly assigned can be shifted back into the available categories by also using the arrow button.

Further categories can also be added via the [New] button, provided that the questionnaire has not been set to use only predefined categories. Please note that these categories will only be available for this one survey. If categories should be generally added for all surveys, please carry out this addition at the questionnaire. To make a newly-created category available for all answers, please click [Save].

If all categorizations have been checked and stored, there are two other settings per question that can be made in the header of the overview:

You can decide how the question should be presented in the PDF report: As an open question without categorization (in this case no bar chart is displayed in the report), or as an open question with categorization (in this case, in addition to the open comments, the results of the categorization are displayed as a bar chart in the report; non-categorized answers are automatically given the category "Not categorized"). You should choose the latter option if you wish to present the results of the categorization in a PDF report.

Hint:
If only the bar charts for the categorization should be displayed in the PDF report, and no image extracts or recorded comments, then you have the option of switching off display of open questions in the report administration ("System Settings/Report settings").

Secondly, the open question can be adopted in the question library as a single or multiple choice question. During this process, the categories are converted into response options.

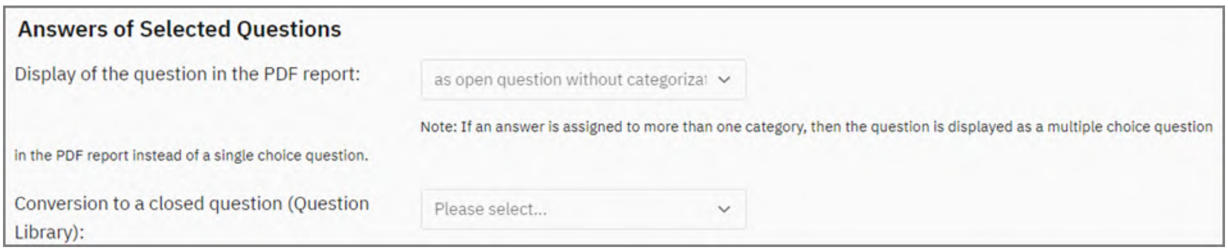


Figure 378: Categorization: Evaluation and Question Library

If all categorization for all questions has been completed and checked, the PDF report with desired settings can be retrieved. As a multiple choice question the open question from the example above looks like this:

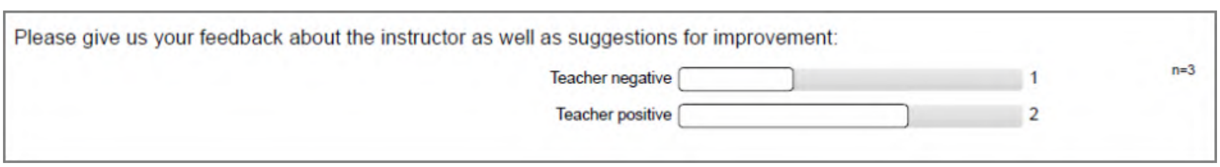


Figure 379: Categorization: Open Questions as Single Choice Question in the PDF Report

The categories are also shown in the raw data (CSV and SPSS). The display mode equals multiple-choice question, i.e. each category is displayed in a separate column for each question. The value 1 means that the category has been assigned, the value 0 means that it has not been assigned.

AI	AJ	AK	AL	AM	AN
Instructor Negative	Instructor Positive	Interesting Topics	Overall Effectiveness	timestamp	Source of dataset
0	1	1	0	2019/01/11 at 11:03:30	O
0	1	1	0	2019/01/11 at 11:04:26	O
1	0	0	1	2019/01/11 at 11:07:44	O

Figure 380: Export of Categories

4.6.4. Categorization of surveys by the Data Entry Assistant

If the Data Entry Assistant is given the right to categorize, the editing view is expanded to include an additional area “Categorizing”

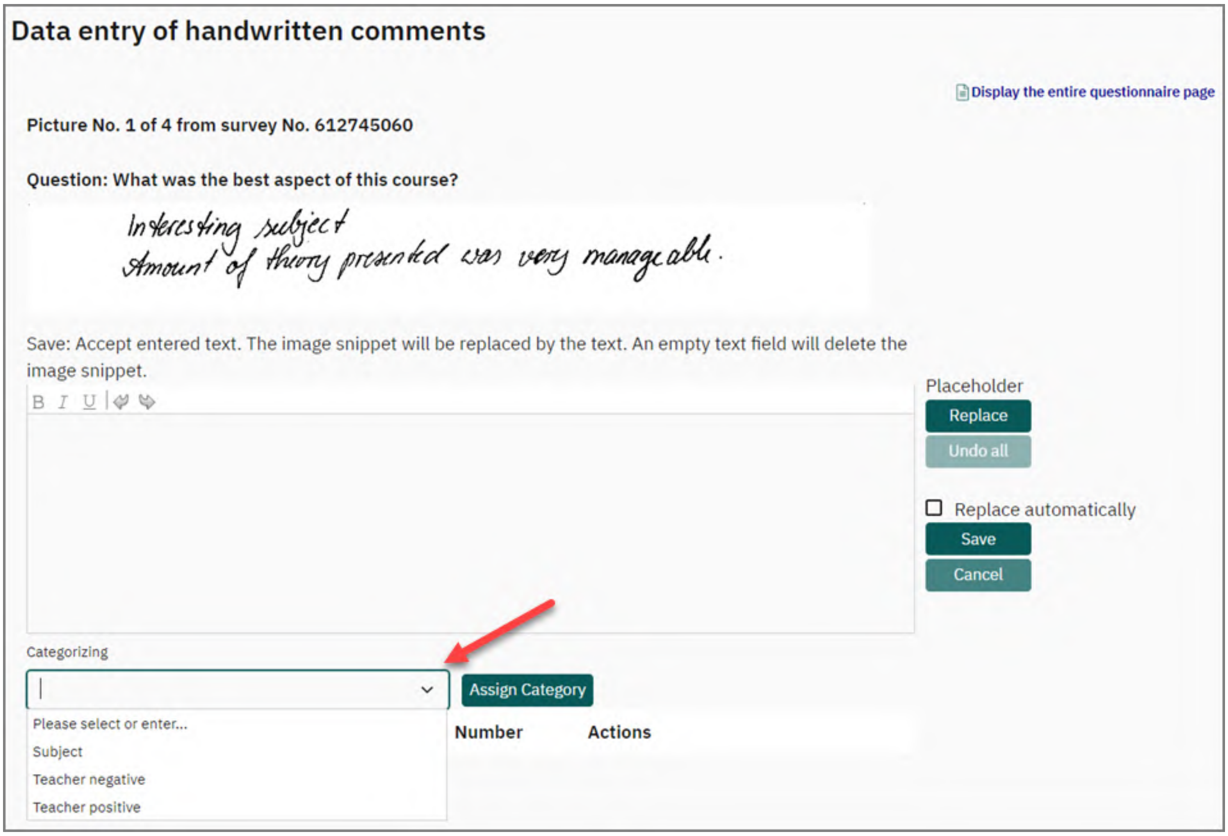


Figure 381: Categorization: Date Entry Assistant

Depending on authorization, the Data Entry Assistant may only select from the categories pre-configured by the Administrator or Subunit Administrator, or enter their own categories for the survey. Please note: If the Data Entry Assistant does not have the right to create their own categories, and the Administrator has not pre-defined any categories for the questionnaires, then the menu is not displayed.

After clicking [Add category], the selected or entered category is added to the comment and taken on in the list of assigned comments.

Note:
Please note that open questions have to be additionally typed-in during categorization by the Data Entry Assistant; the image extracts are otherwise deleted if no text has been stored in the entry field - as is usual during data entry.

As soon as all required categories have been stored and the answer text was transferred, all changes are saved by clicking on [Save], and the next answer is displayed. Once all answers to open questions have been processed, the data is transmitted.

4.6.5. Categorization of reports by the Report Creator

The Report Creator has the option of retrospectively categorizing reports that have already been created. For this, it has to be ensured during report creation that open questions are taken on in the report.

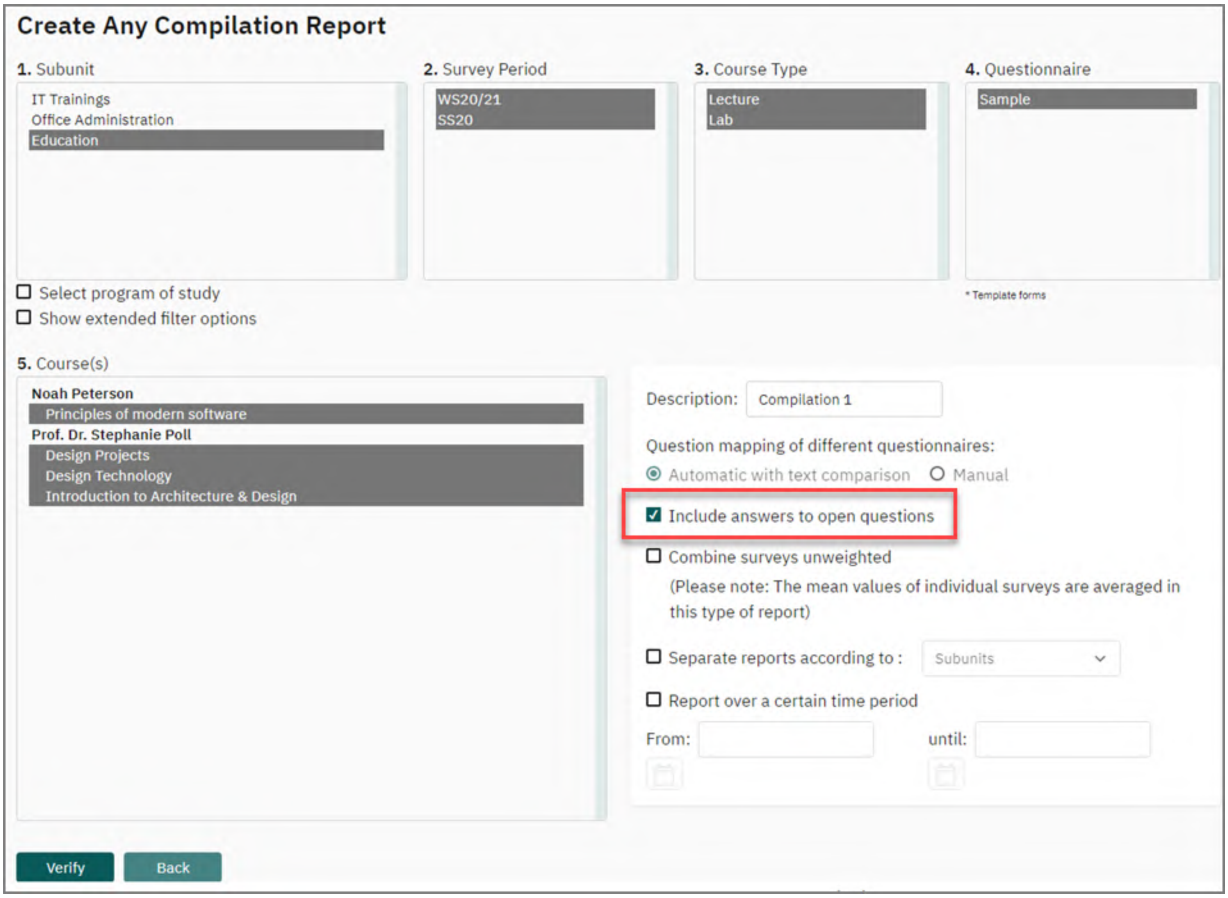


Figure 382: Integrating open questions in the report

The categorization can be carried out subsequently in the details of the report via the menu “Categorize answers to open questions”.

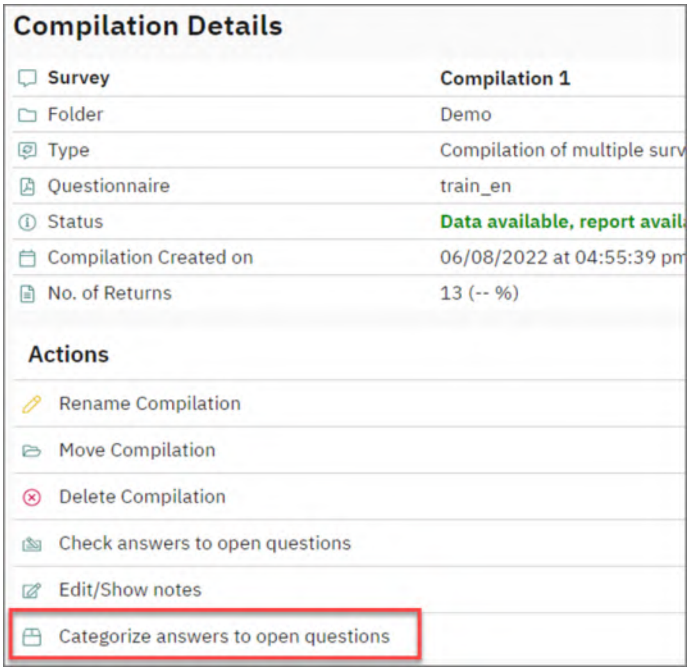


Figure 383: Categorization: Access as Report Creator

The categorization window corresponds to that of the Administrator or Subunit Administrator (see above). Depending on the authorization however, the Report Creator cannot add their own new categories, but may only use the categories specified by the Administrator. Please note: If the Report Creator does not have the right to create their own categories, and the Administrator has not pre-defined any categories for the questionnaires, then the menu is not displayed.

If the report creator aggregates data from multiple surveys which have already been categorized by either the administrator or the data entry assistant, these categories are included in the aggregated report. The only requirement is that the report creator has the right to categorize the data. The categorization can be viewed and edited in the report details.

4.7. Instant Feedback: The PDF Report

- Report Settings
- Report Name & Usage
- General Settings
- Report Elements & Settings
- Specific Elements of the PDF Report
- PDF Report Definitions
- Upload PDF Report Plug-ins
- Download and Sending of Reports

After scanning the questionnaires (during which you may have verified unclear fields and entered open questions) you can immediately view the evaluation results.

With the preset evasys report, a report can be generated immediately, even without configuration settings. This report is available in two types: as HTML and as PDF report.

4.7.1. The HTML Report

In addition to the PDF report, the HTML report for a survey is also available. In contrast to the report in PDF format, the HTML report allows an interactive examination of the data. In addition, it is accessible according to the requirements of the WCAG standard 2.1 AA and optimized for presentation on mobile devices.

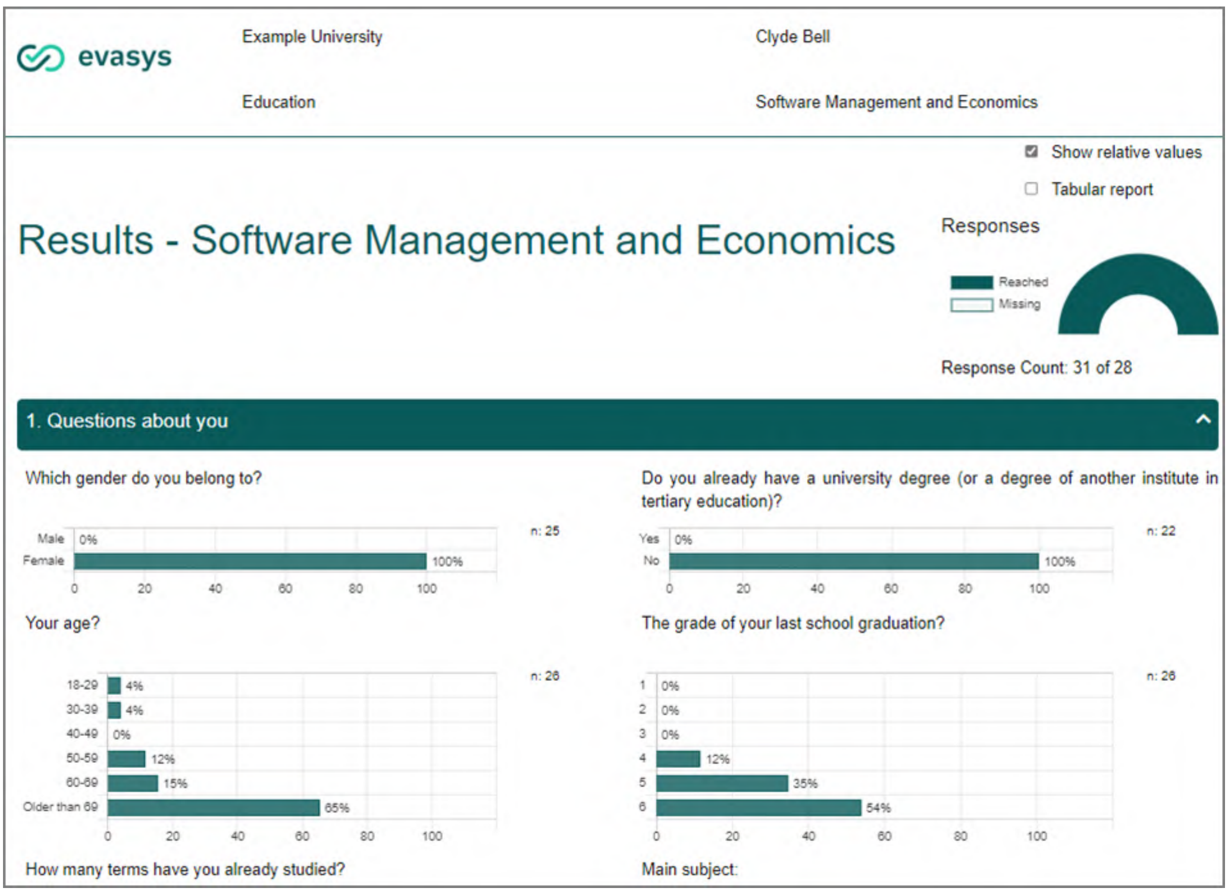


Figure 384: New HTML-Report

Access the Report

The new report is available for individual surveys as well as for aggregated reports in the report creator. As usual, you can access the report via the corresponding icon in the list of surveys/reports or via the survey/report details.

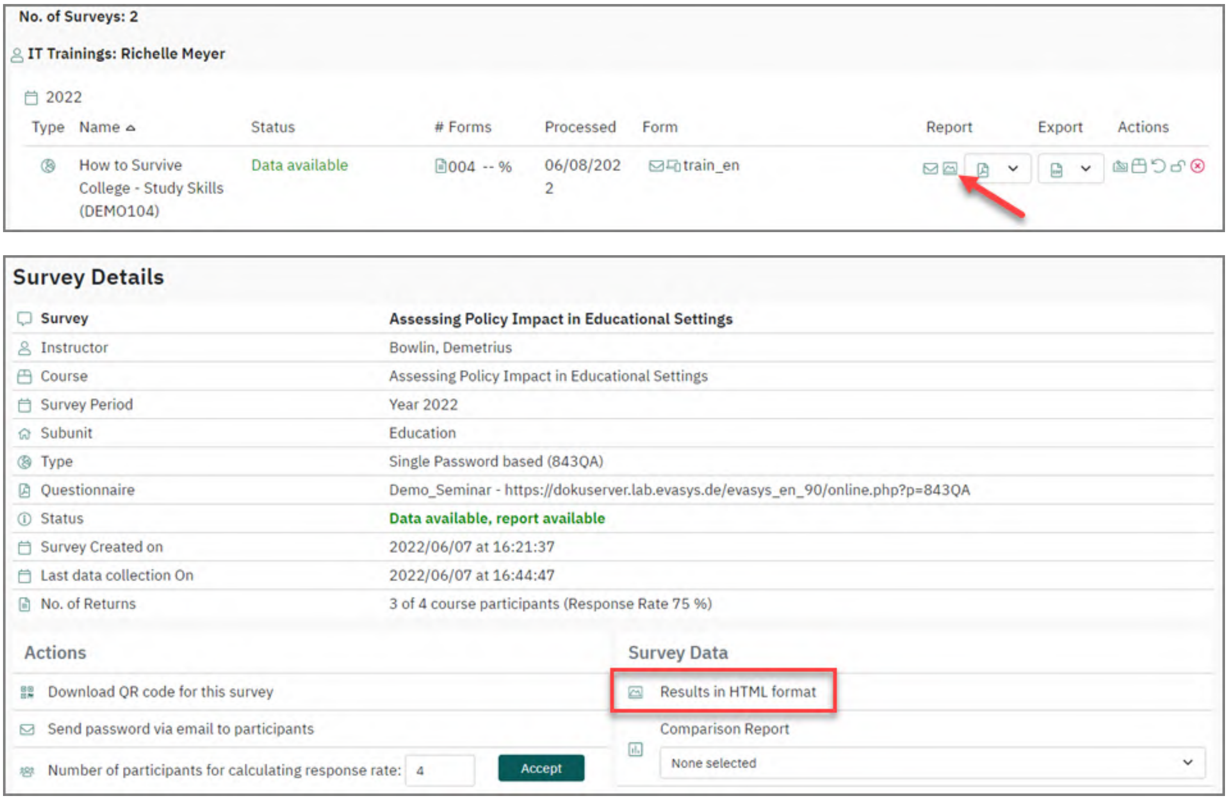


Figure 385: Open HTML Report in the survey list and survey details

The report is thus available to all users of the type "administrator", "subunit administrator" and "report creator" for results from the central evaluation. Active users can also use the HTML report for their own survey projects.

If the result view for participants is activated for a questionnaire in the questionnaire details, survey participants can also access the report and view the evaluation of the survey after completion of the survey via a resent link with their TAN.

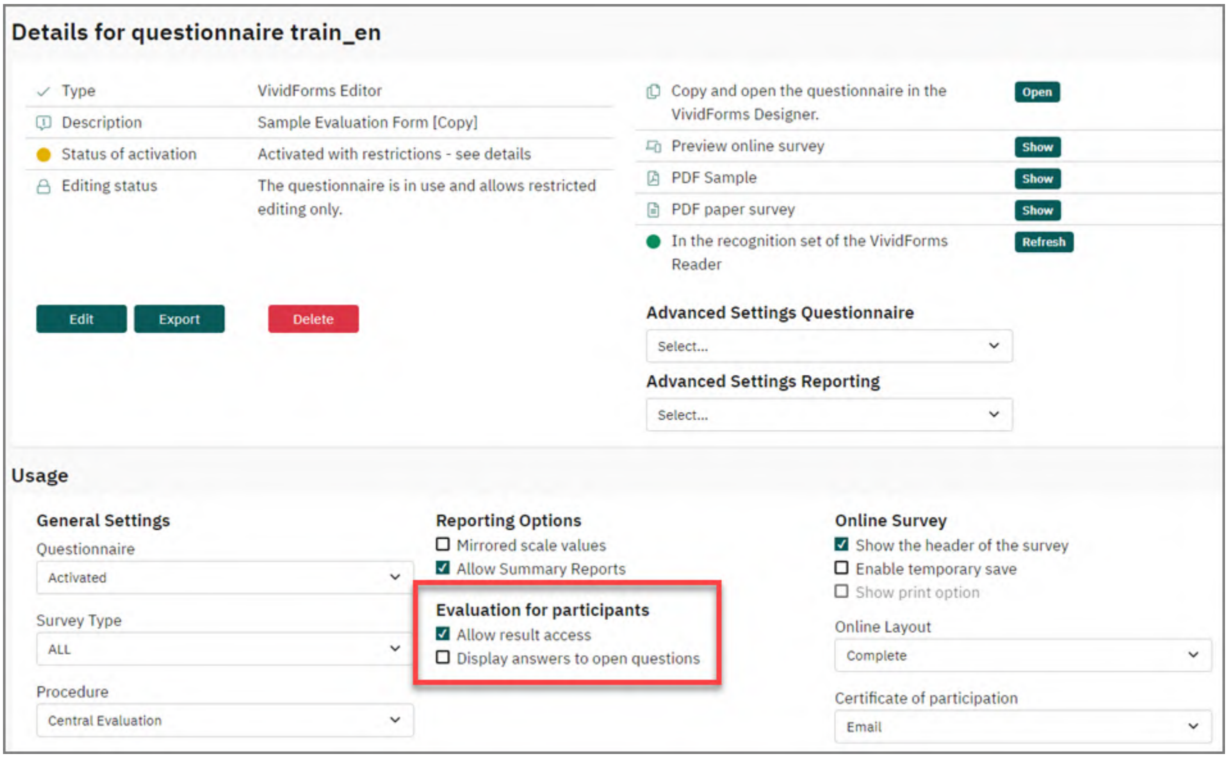


Figure 386: Activate result access for participants

It is also possible to send the link to the report by email. In this case it is necessary to use the placeholder [DIRECT_HTML_REPORT_LINK] in the text template "Results of a survey":

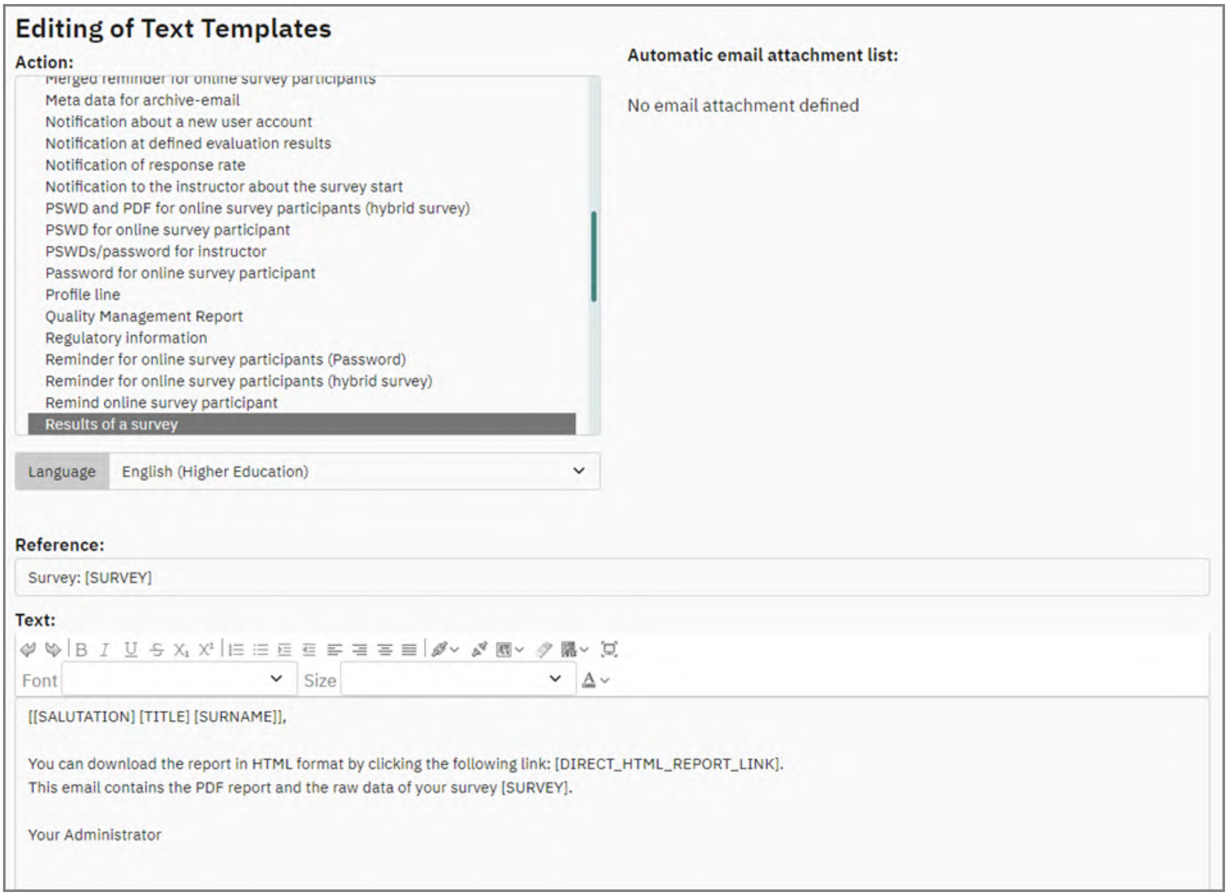


Figure 387: Text Template “Results of a survey“ with placeholder for the HTML report link

The recipient of the email receives the link to the report as well as the evaluation in PDF format. If you do not wish to include the PDF Report, you can deactivate the attachment in the System Settings. To do so, go to the menu "System Settings / evasys Settings / E-Mail Functions & Accounts" and deactivate the option "Attach PDF report".

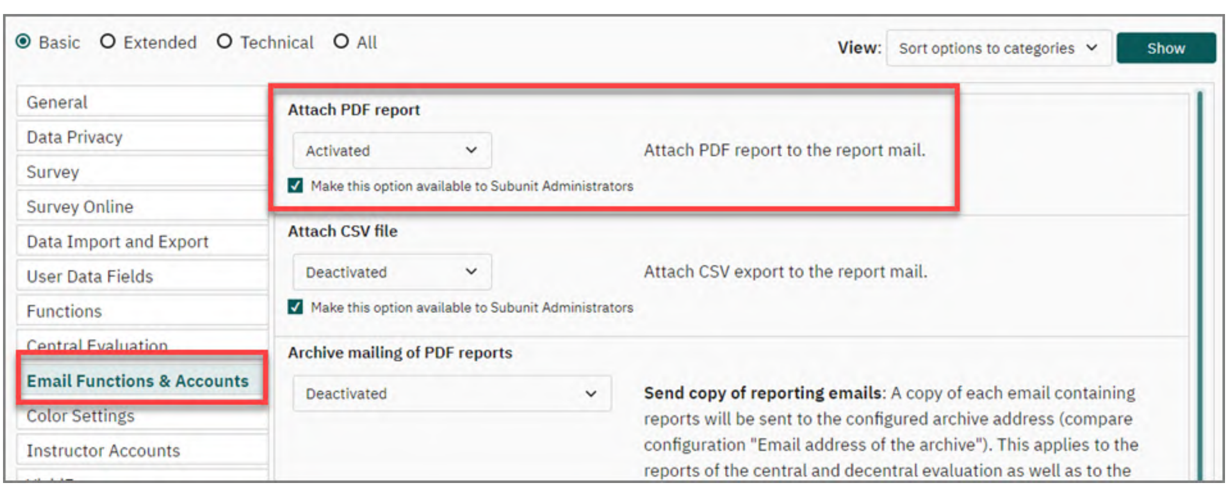


Figure 388: Deactivate PDF Report attachment

The evaluation including the link to the HTML report can be retrieved from the details of a survey via the [Email] button:

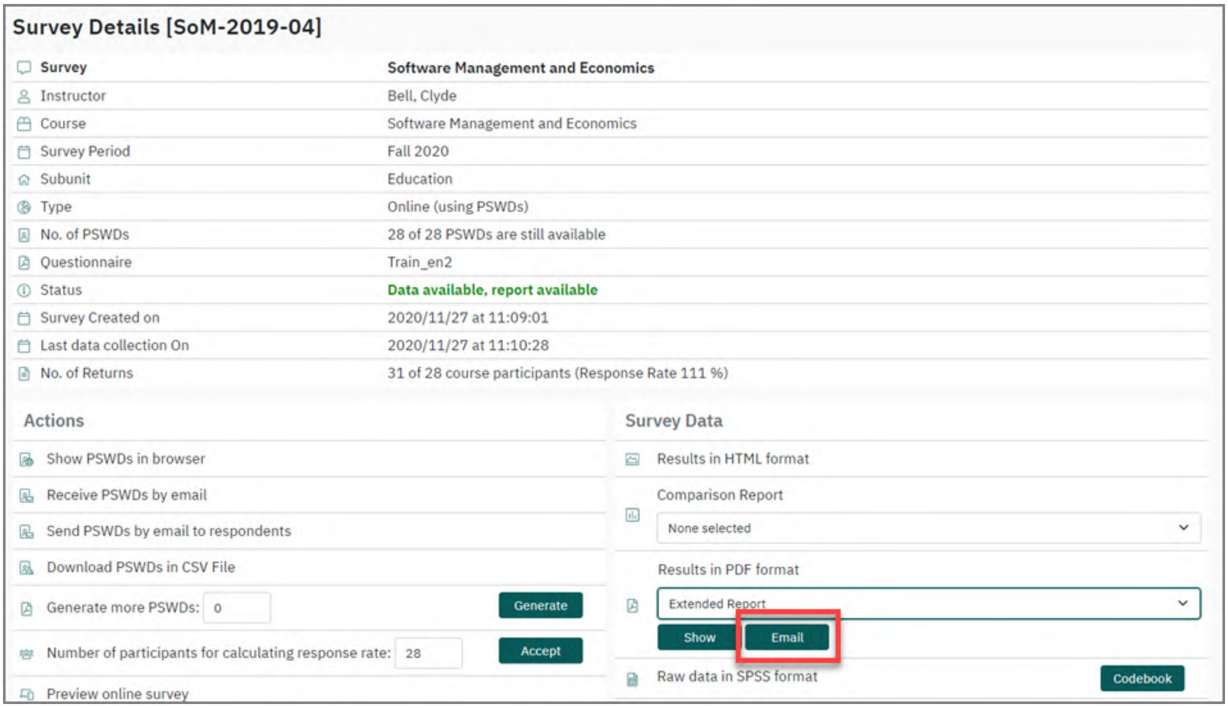


Figure 389: Sending the HTML report from the survey details

It is also possible to send the HTML report through time control:

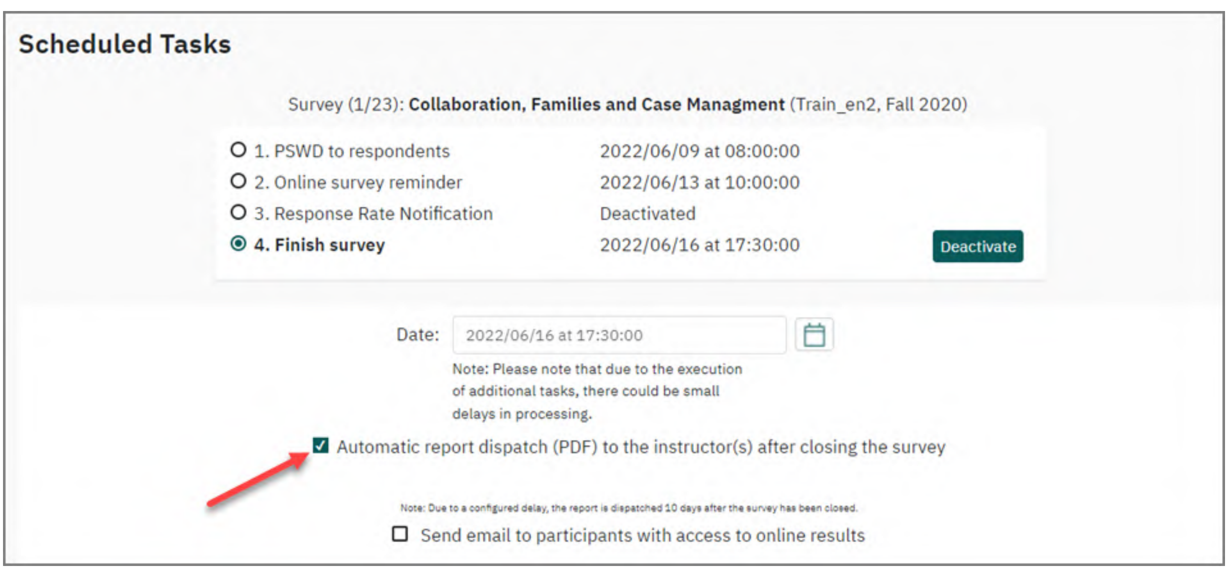


Figure 390: Dispatch of the HTML report using time control

Tip:
You can add password protection to reports. When users click on the link, an input field opens first in which the required password must be entered:

Figure 391: Password protection - HTML report

To set a password, switch to the main menu "System Settings/ evasys/ Email Functions & Accounts/Password protection for reports sent by email". Assign a password of your choice and save your settings. The password defined here applies to all reports retrieved within the central evaluation. If required, this function can be made available to subunit administrators so that they can define a password that applies to their own subunits.

For more information on setting a password protection, see „Password-protected sending of reports“, on page 413.

Configuring the Report

Some settings for the HTML report can be made in the evasys configuration in the "System Settings / evasys Settings / Functions" menu, "HTML report" tab. To view the settings, please activate the option "All".

All settings that were valid for the previous version of the report are also applied to the new report.

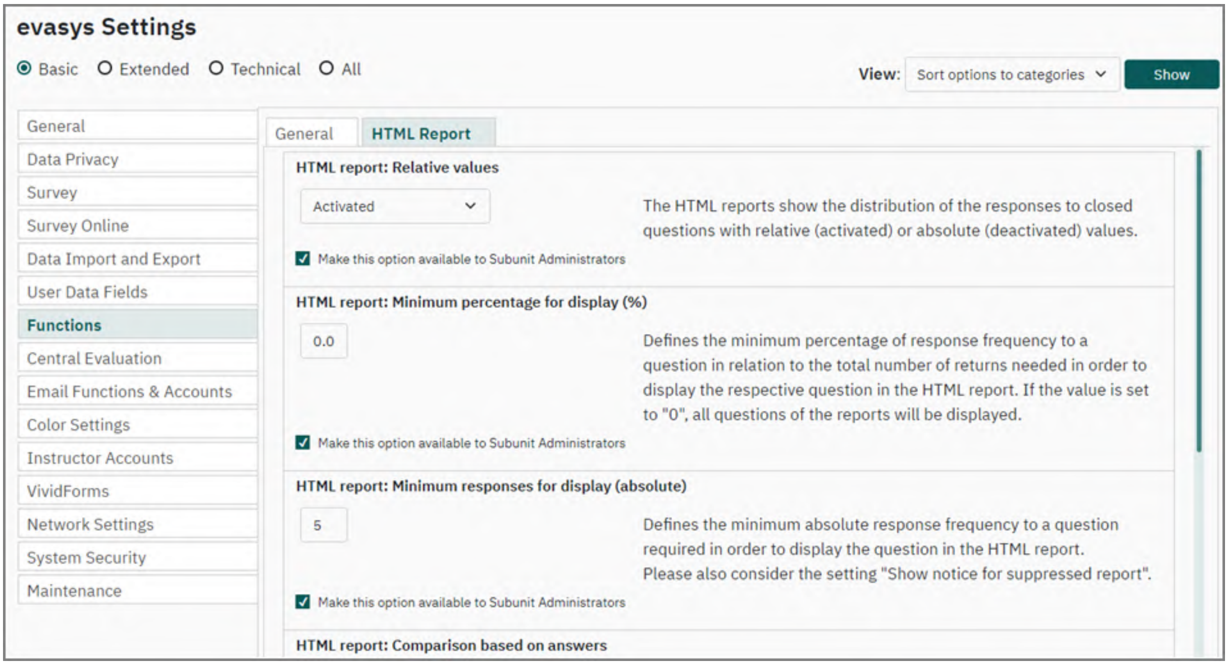


Figure 392: Configure HTML Report

Structure of the Report

In the upper part, the header of the report equals the underlying questionnaire. The placeholders that were used in the questionnaire are replaced by the information from the respective survey, e.g. name of the organization, subunit, instructor, survey etc. Please note that all placeholders that do not originate from the survey context (e.g. participant data) are ignored.

On the left side, the organization logo is displayed, which is stored in the evasys organization profile (menu "System Settings / Profiles / Organization").

Figure 393: Header

The title of the survey is displayed below the header. To the right of the title, the return of the survey is shown graphically and in numbers. The number of people who participated or who did not participate can be displayed by mouseover:

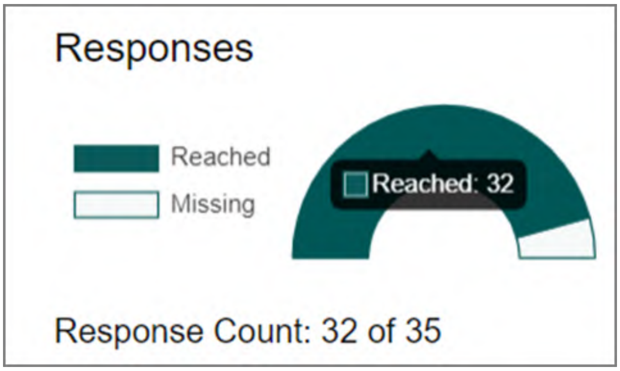


Figure 394: Response Information

If the survey is based on a multilingual questionnaire, the language of the report can be changed using the "Language" drop-down menu.

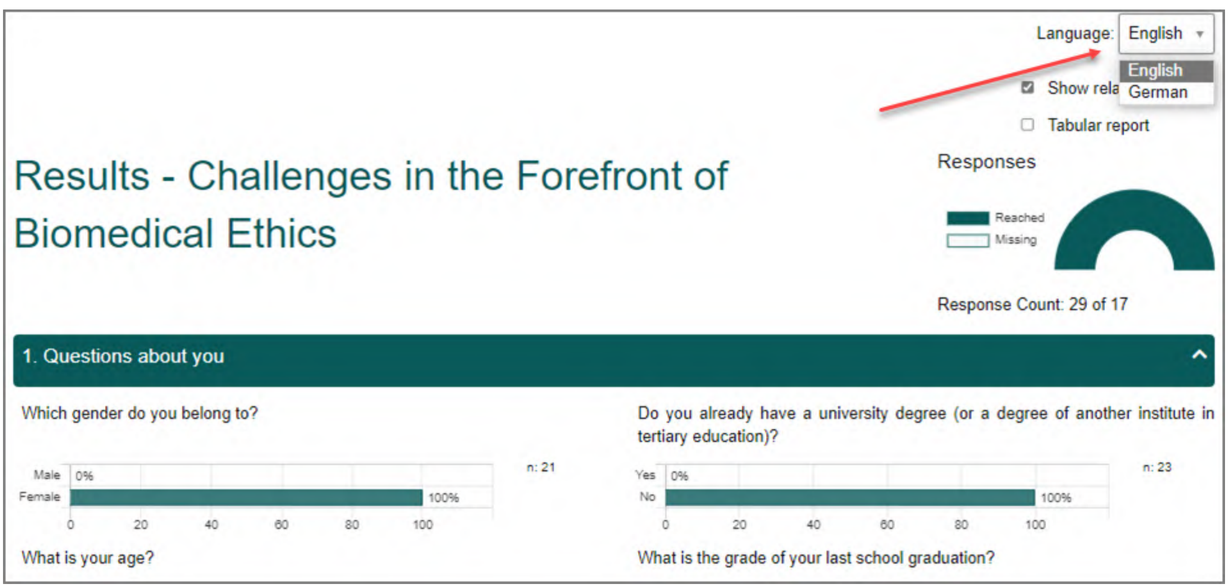


Figure 395: Language selection for multilingual questionnaires

When the option „Show relative values“ is activated, the relative values of the results are displayed. If the option is deactivated then absolute values are displayed.

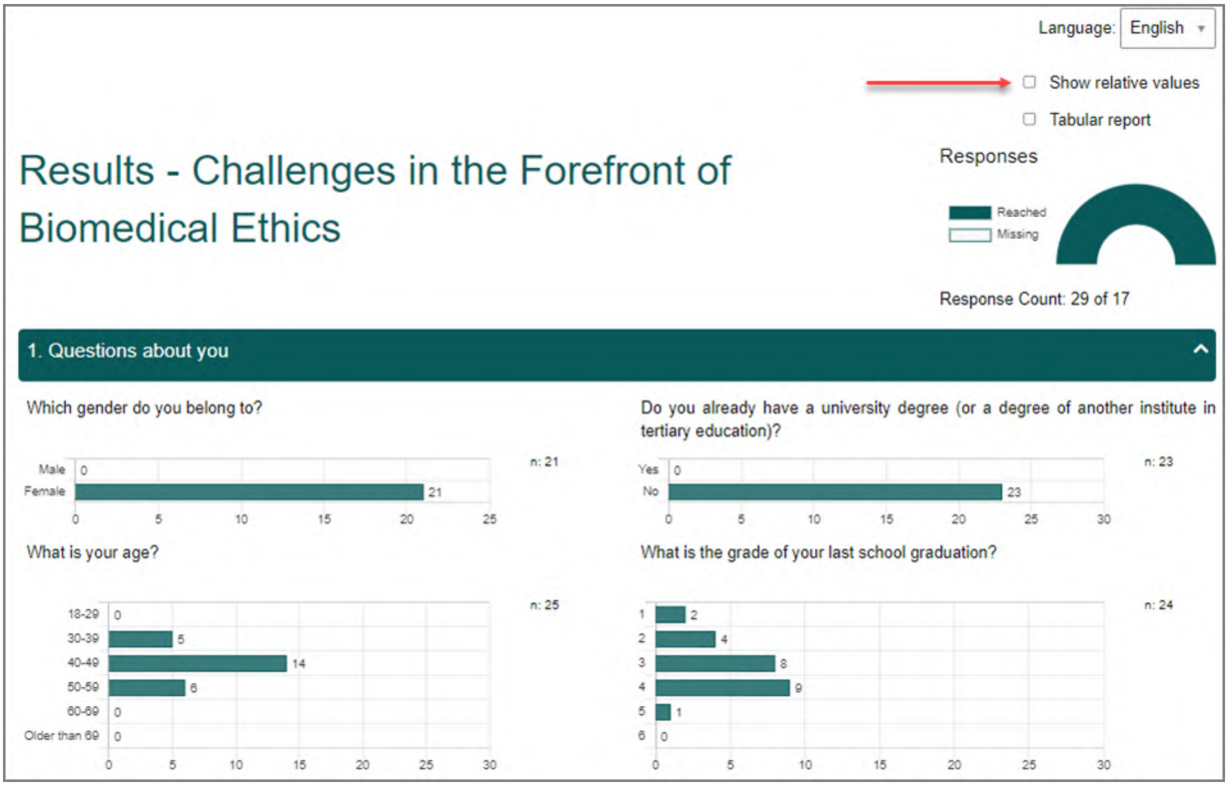


Figure 396: Show relative values

When the option "Tabular report" is activated, a table view can be activated which meets the requirements of accessibility. For further information see the "Accessibility Information" at the end of this chapter.

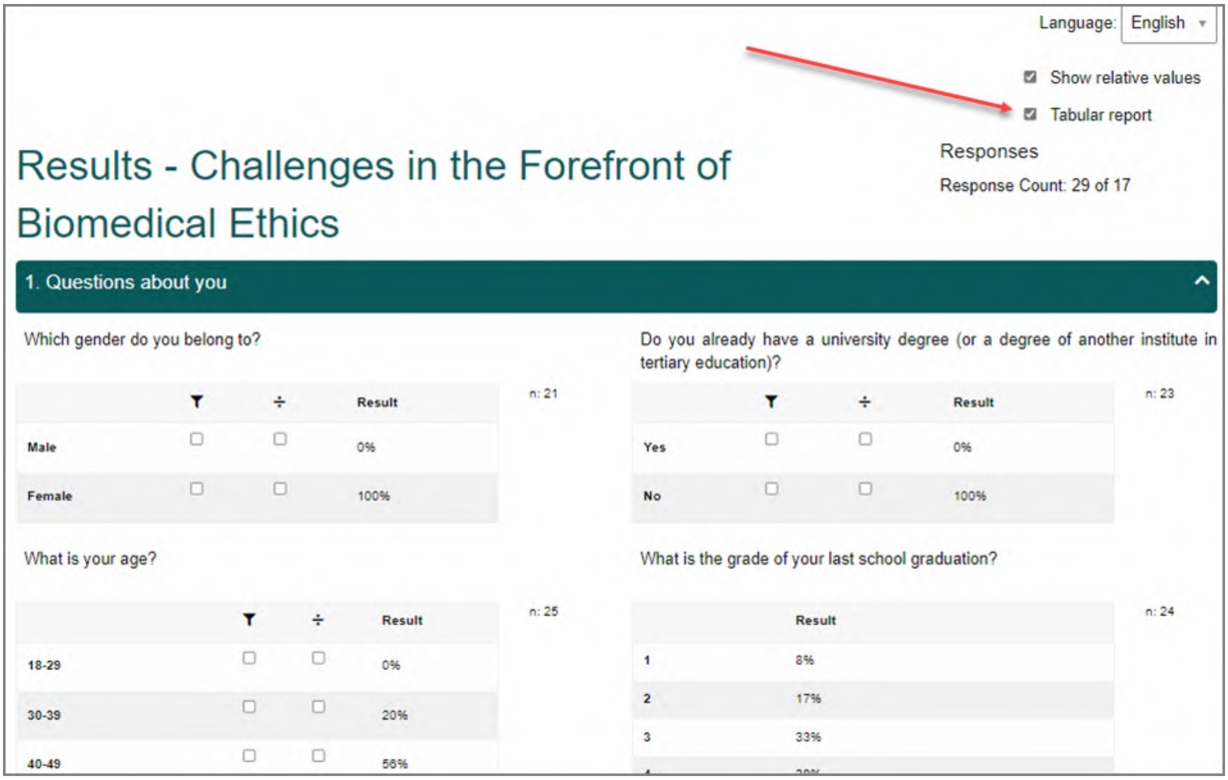


Figure 397: Activate tabular report

Below the header, the individual question groups can be opened by clicking on the heading and then be closed again.

Depending on the type of question, the results of the individual questions are presented differently.

- Single Choice Questions, Multiple Choice Questions, Matrix Questions and Ranking Questions

These questions are shown as a bar chart. Depending on the settings in the configuration (see above), the results can be displayed as absolute or relative values.

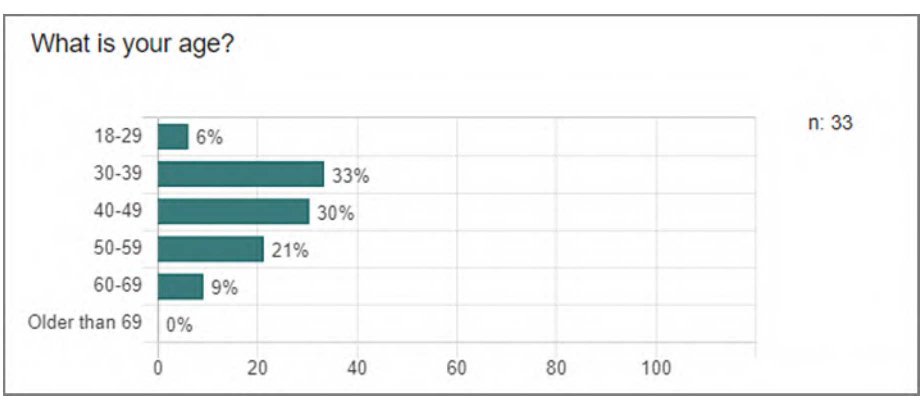


Figure 398: Bar chart of a single choice question

- Scaled Questions and Grade Value Questions

These questions are initially presented in an overview showing the mean value. This way, the general outcome can be quickly read at first glance.

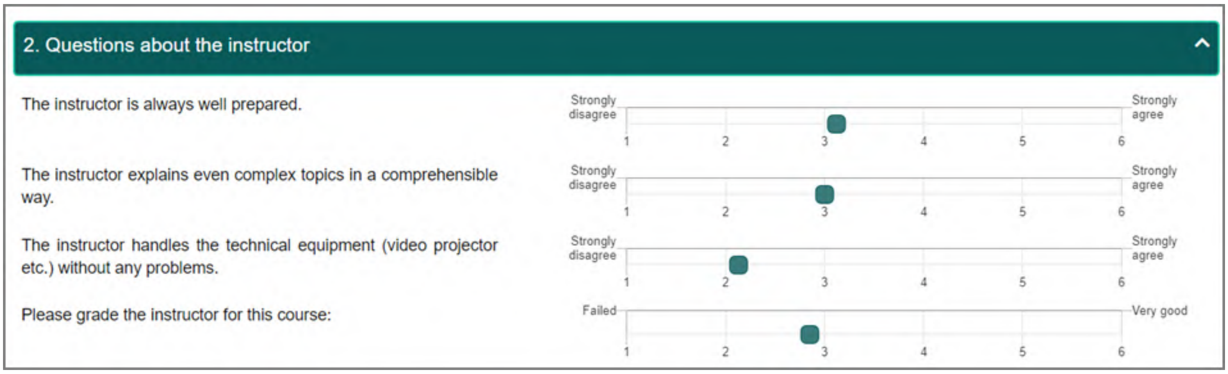


Figure 399: Overview of scaled questions

If you click on the blue mean value point in the diagram a detailed view of the question opens. It provides the frequency distribution in the form of a bar chart and the following statistical key figures:

- n = Number of responses
- av = Average
- std = Standard deviation
- ab = Abstention

Figure 400: Detailed view of a scaled question

- Open Questions and ICR Questions / Segmented Open Questions

As in the PDF report, the answers to these questions are listed one below the other. This can be done in a separate section at the end of the report, or at the position where they appear in the questionnaire. This can be specified in the configuration of the HTML report (see above).

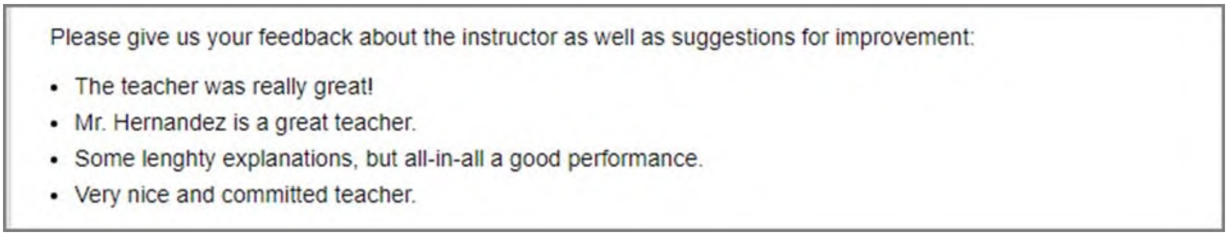


Figure 401: Answers to open questions

Filtering data

The report allows for interactive filtering according to the individual answer options of closed questions. In this way, the analysis can be shown for a subgroup of the respondents (e.g. only for the female participants, only for the participants who checked answer option 5 and 6 of a scaled question, etc.).

To set a filter, click on a bar in the bar chart. A small window opens that allows you to select the desired answer options:

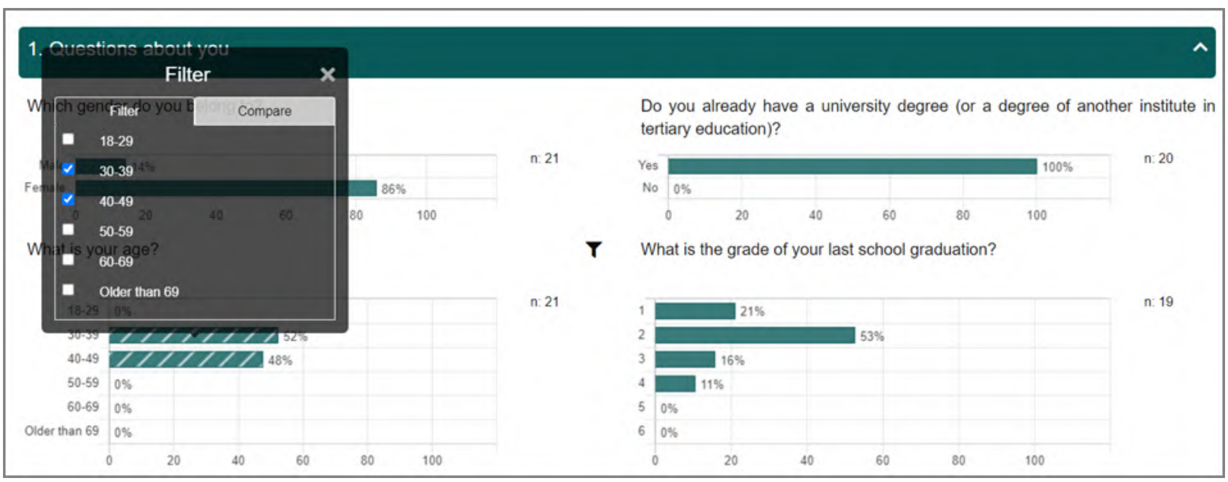


Figure 402: Set filter

If there are more than ten answer options for a question, a drop-down menu is offered in the filter window to select the answers. Multiple selection is always possible, i.e. you can use several answers to a question as the basis for a filter.

If one or more answer options are selected, the report is immediately filtered live. All diagrams are updated according to the selection.

Answers that serve as the basis for a filter are highlighted by hatching. The question is also marked with a small filter symbol. All the filters set are also shown in an overview in the header section of the report.

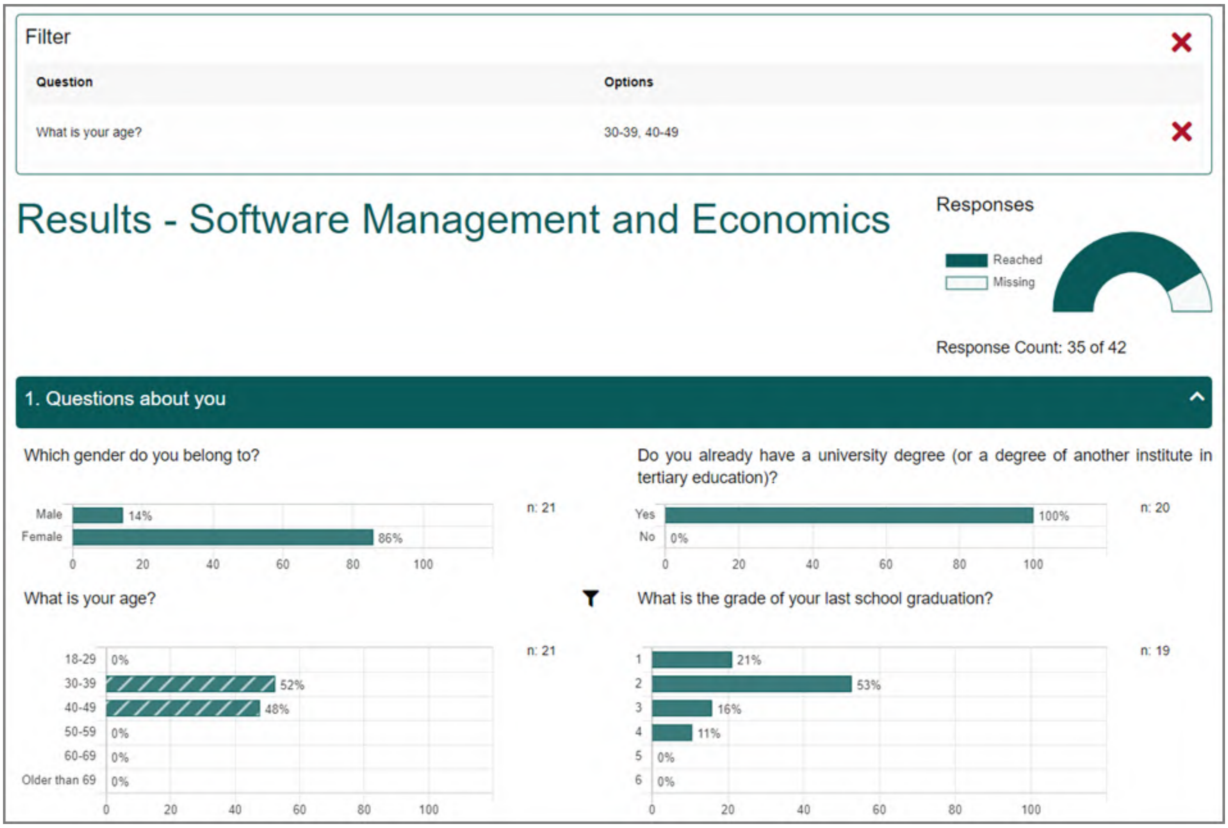


Figure 403: Filter overview

You can set any number of filters for your report. The individual filters or all filters at the same time can be removed by clicking on the red cross in the filter overview. A single filter can also be removed by re-editing an answer option.

Tip:
To compare two different filters of a report, you can also open the report in parallel in two browser windows and display them side by side with different filter settings.

Comparison of data

In the HTML report you cannot only filter individual answer options, you can also compare the results of filtered data. In this way, for example, the results of two subgroups of respondents (e.g. age group 30-39 and 40-49) can be juxtaposed. You can use single-choice and multiple-choice questions as a basis for comparisons.

To make a comparison, click on one of the bars in the bar graph. Select the "Comparison" tab in the window that opens:

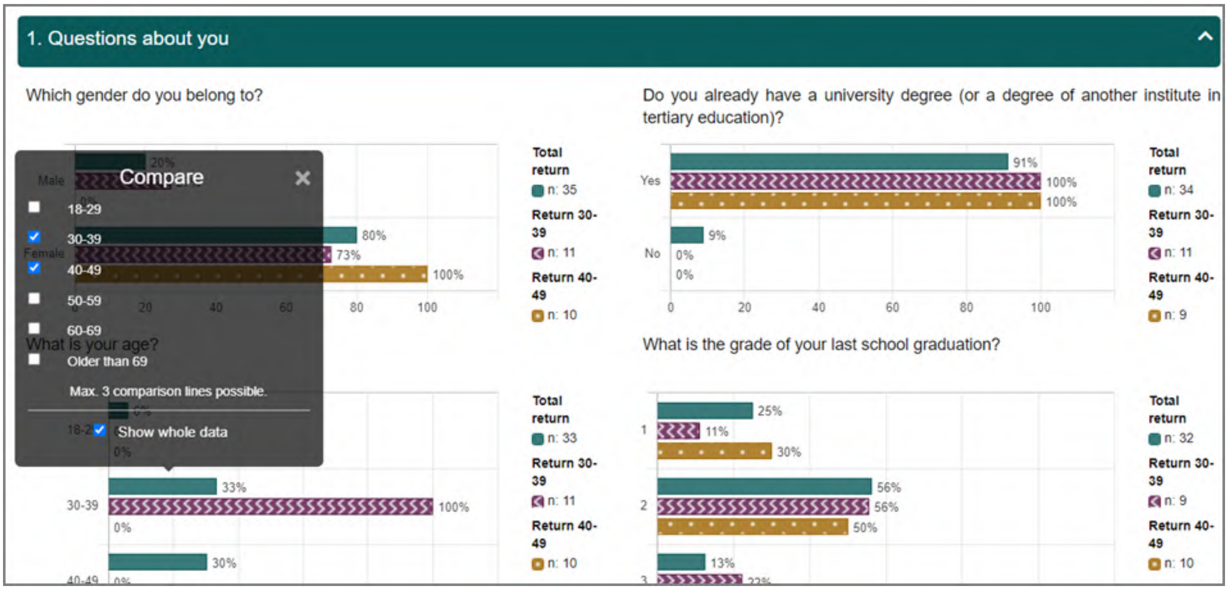


Figure 404: Define comparison

You can select a maximum of three answer options for comparison. You also have the option of displaying the entire database as a comparison bar.

If you select one or more answers, the report is filtered live immediately. All diagrams are updated according to the selection.

The comparison bars are highlighted with a different color and pattern. The defined comparisons are also shown in a legend in the header area of the report. The comparison can be deactivated again here, and the total return can optionally be shown or hidden.

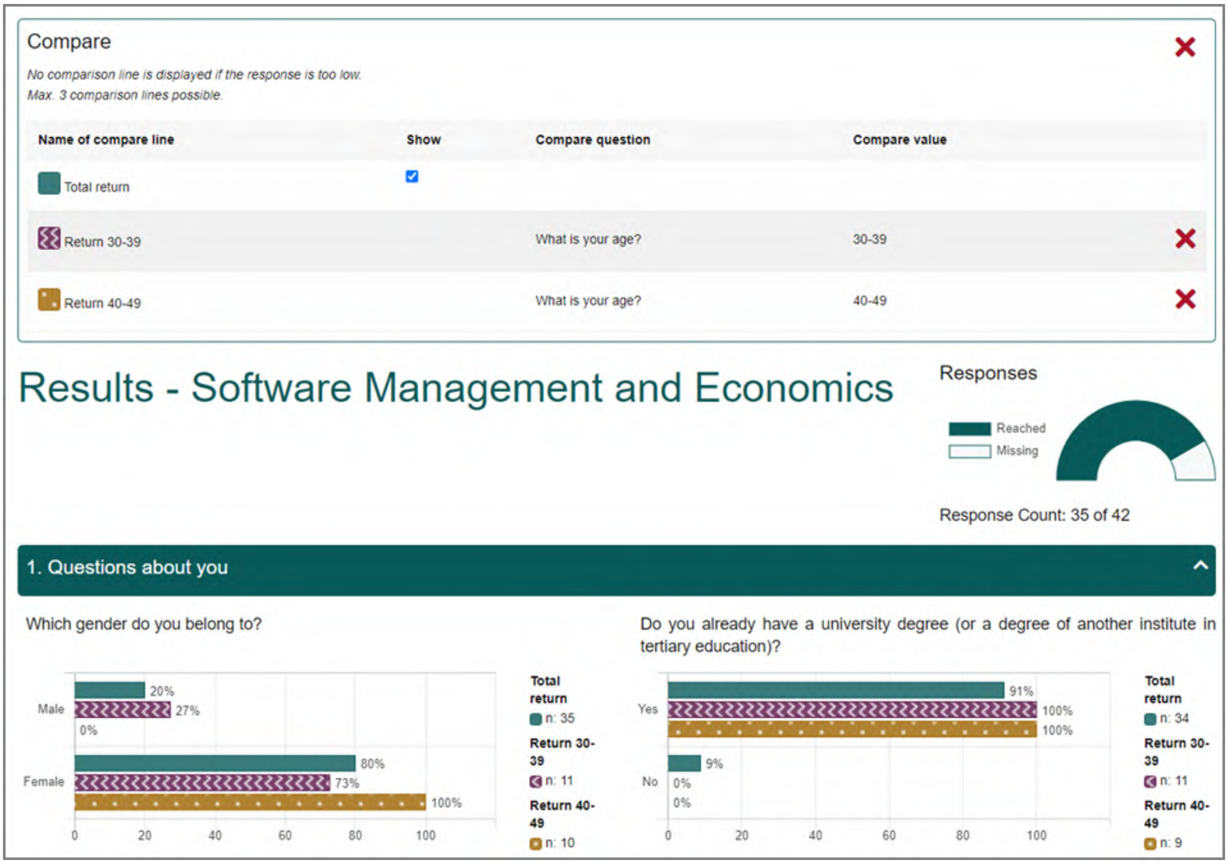


Figure 405: Comparison Overview

The comparison values are shown in graphical form as bars and with the corresponding values (n, av, std.). In the case of question types with bar charts, they are displayed as comparison bars directly in the chart. In the case of scaled questions, the respective comparison mean appears in the overview. If you click on a value, a bar chart opens that shows the comparison data graphically and numerically:

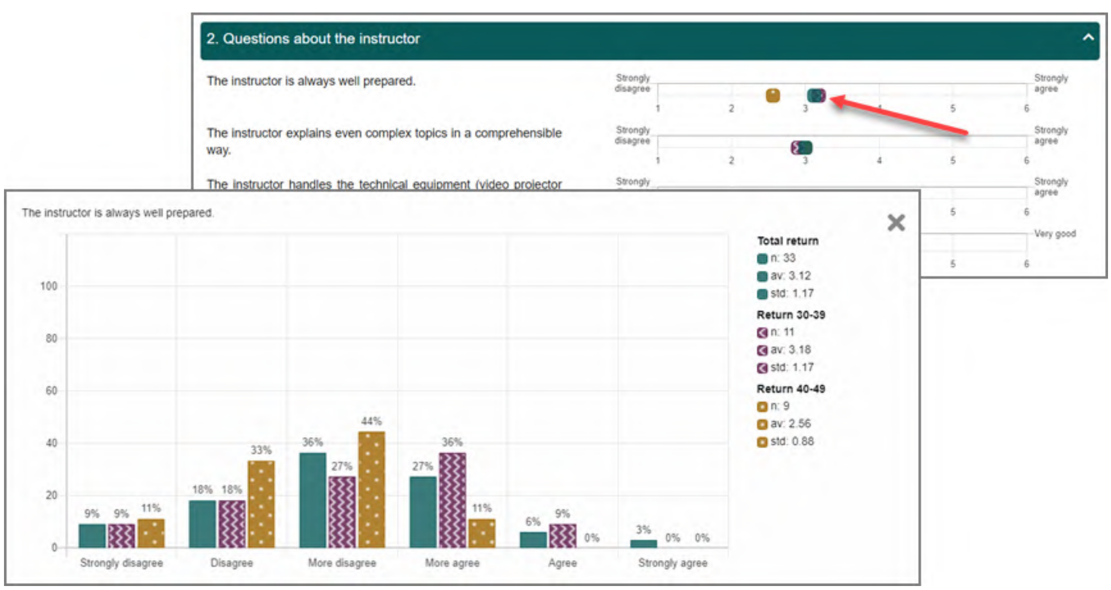
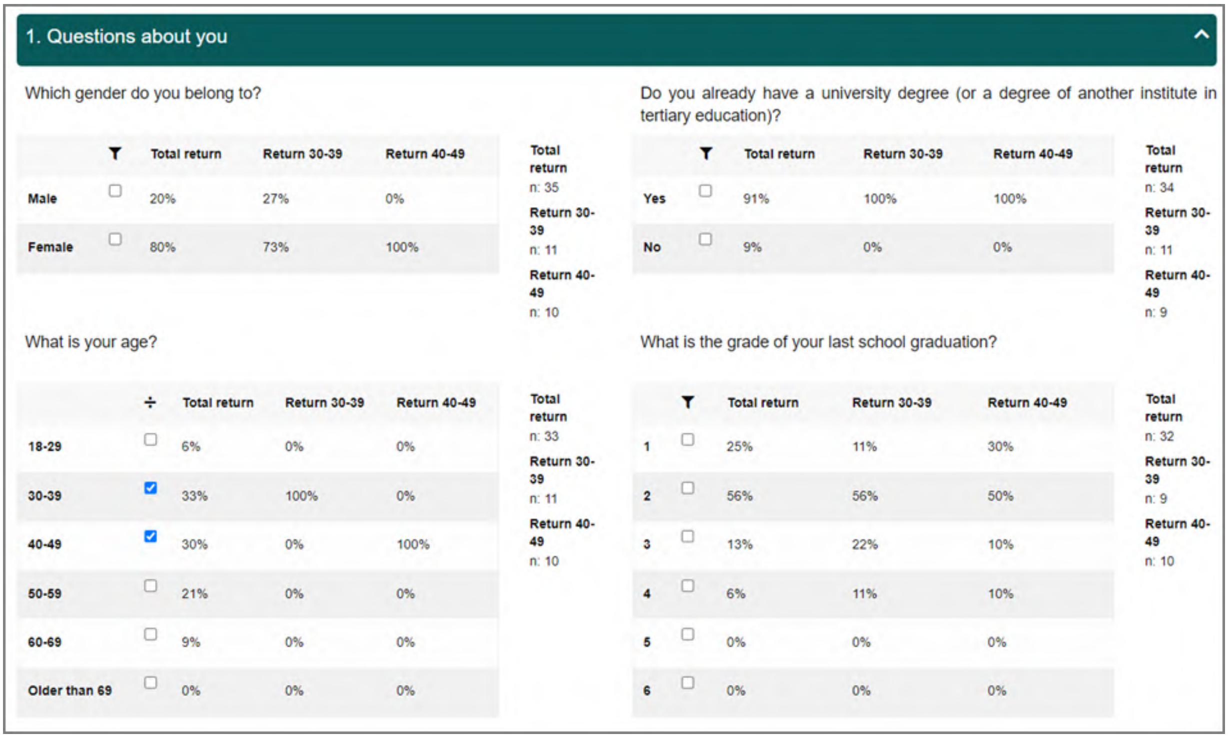


Figure 406: Bar charts with comparison data

The comparison values are also shown in the table view. The answers that are the basis for the comparison are marked with an icon and are highlighted:



1. Questions about you

Which gender do you belong to?

		Total return	Return 30-39	Return 40-49
Male	☐	20%	27%	0%
Female	☐	80%	73%	100%

Total return n: 35
Return 30-39 n: 11
Return 40-49 n: 10

Do you already have a university degree (or a degree of another institute in tertiary education)?

		Total return	Return 30-39	Return 40-49
Yes	☐	91%	100%	100%
No	☐	9%	0%	0%

Total return n: 34
Return 30-39 n: 11
Return 40-49 n: 9

What is your age?

		Total return	Return 30-39	Return 40-49
18-29	☐	6%	0%	0%
30-39	☑	33%	100%	0%
40-49	☑	30%	0%	100%
50-59	☐	21%	0%	0%
60-69	☐	9%	0%	0%
Older than 69	☐	0%	0%	0%

Total return n: 33
Return 30-39 n: 11
Return 40-49 n: 10

What is the grade of your last school graduation?

		Total return	Return 30-39	Return 40-49
1	☐	25%	11%	30%
2	☐	56%	56%	50%
3	☐	13%	22%	10%
4	☐	6%	11%	10%
5	☐	0%	0%	0%
6	☐	0%	0%	0%

Total return n: 32
Return 30-39 n: 9
Return 40-49 n: 10

Figure 407: Table view with comparison data

Note:
The minimum return for displaying results, as defined in the HTML report settings, is also taken into account when filtering (standard: minimum return 5). If there is too little return for a comparison, the data for the comparison is not displayed.

If you want to prevent the comparison of results in the HTML report in general, you can do this via a corresponding setting in the configuration of the HTML report (menu “System Settings / evasys Settings”, tab “Functions / HTML Report”, option “Comparison based on answers").

Use on Mobile Devices

The HTML report responsively adapts to the respective device. It can therefore also be opened on tablets and smartphones, both in portrait and landscape format. The filter functions described above are also available in the mobile display.

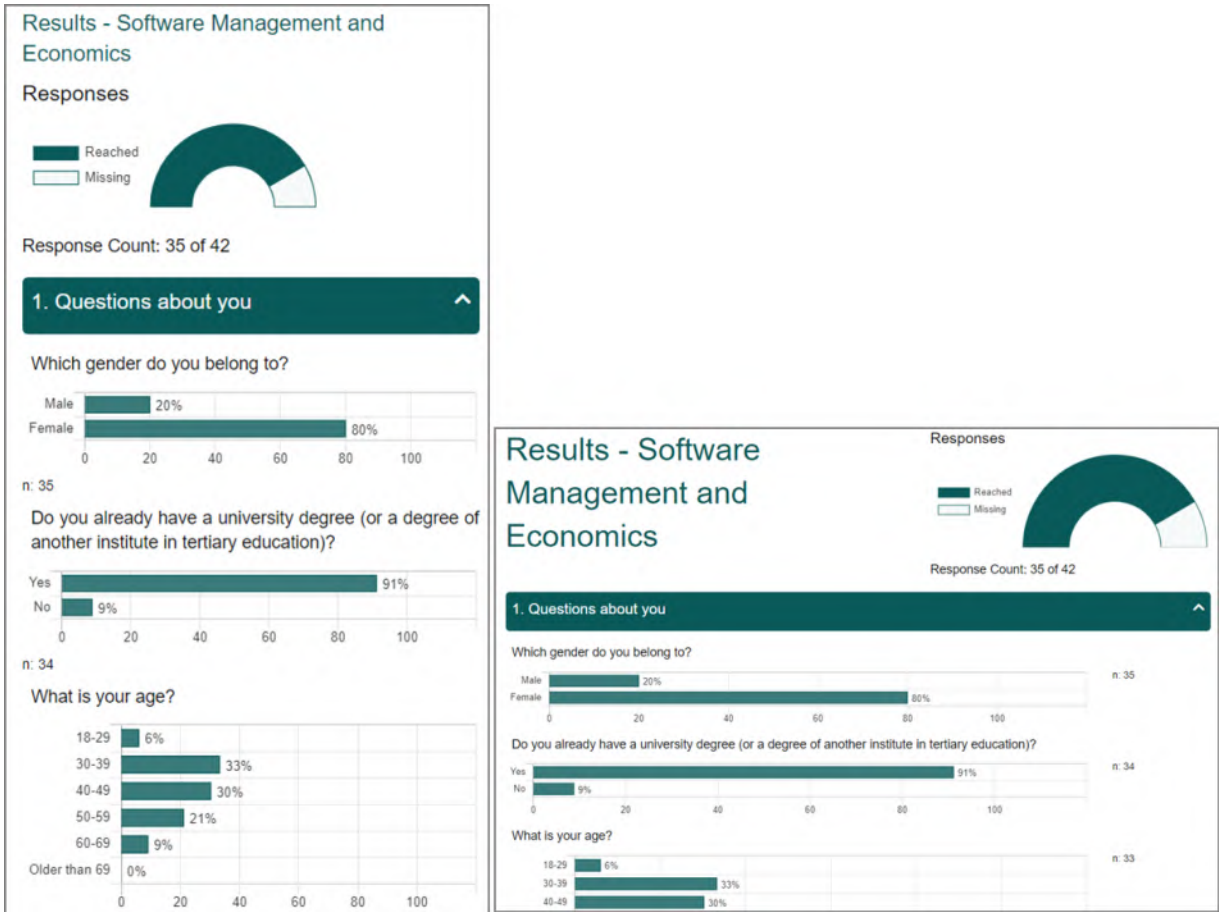


Figure 408: Mobile display

Please advise survey participants to allow pop-ups in the browser for viewing the results. iPhone users in particular must first activate them in the Safari settings, otherwise opening the report will be suppressed.

Accessible use in accordance with WCAG 2.1

The new HTML report was developed with a strong focus on accessibility. To best support different user groups, you can switch between two types of display. Both forms of representation include a logical structure and sufficiently high contrasts. Keyboard operation is also possible in both display forms, as are enlargements or the adjustment of spacing and line heights in accordance with WCAG 2.1. The table display offers barrier-free access to even complex data for screen reader users. There is also some information on navigation and quick orientation.

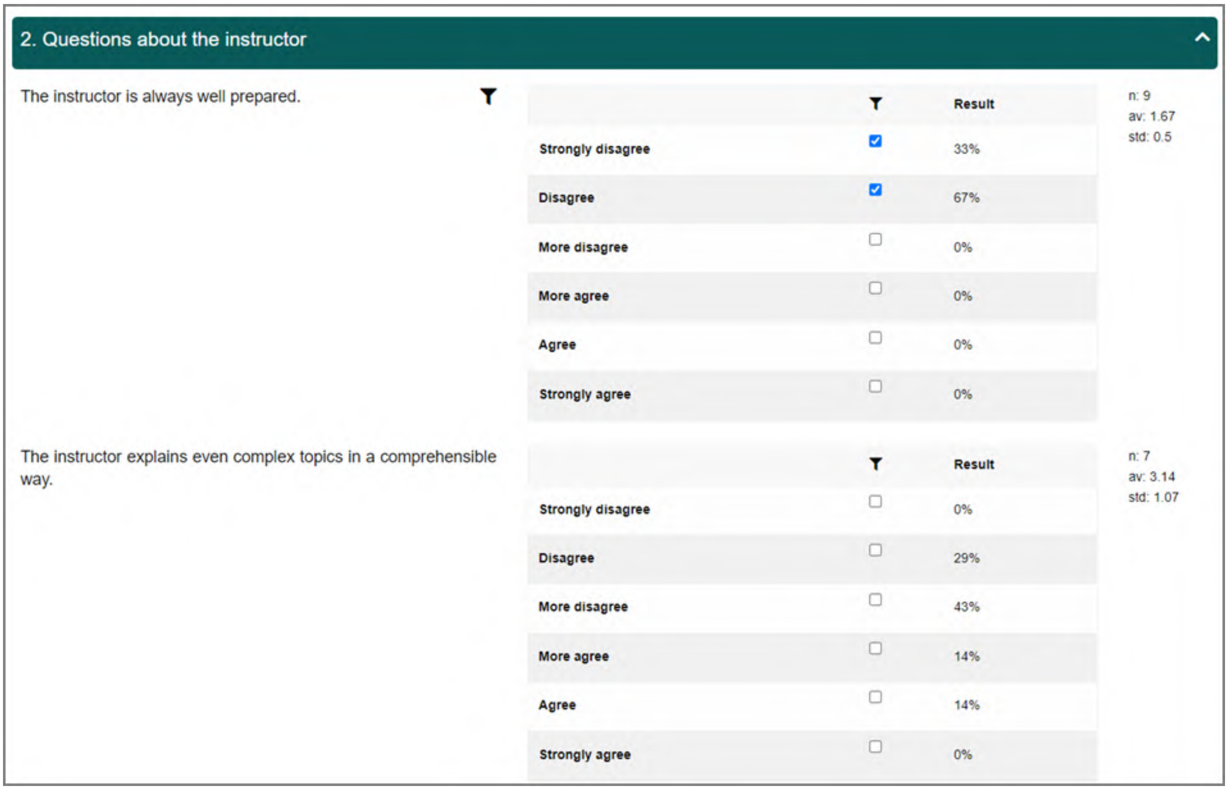


Figure 409: Accessible table view

Since version 8.0 (2200) the evasys online survey has already met the accessibility requirements in accordance with the international standard WCAG 2.1 AA. The new HTML report has now also been developed and tested to meet the accessibility requirements of WCAG 2.1 AA. It can be considered compliant with the required criteria.

4.7.2. Notes on the use of the HTML report by people with disabilities

General information about the HTML report

The HTML report has both a chart view and a table view to support different user groups and perception channels. The table view provides accessible access to even complex data for screen reader users.

Both views have an identical logical and hierarchical outline based on headings and are fully keyboard operable. You can also zoom in on both views using your browser's on-board tools and make adjustments to line heights, for example, without losing information. Also, you can operate both views in portrait as well as landscape mode of your smartphone.

The HTML report has dynamic filtering capabilities. If you activate filters, then information about the data is automatically displayed on the page. In addition, a table with all activated filters is displayed in the upper area of the HTML Report after you trigger a filter.

Navigating in the HTML report with screen readers

Screen reader users will find brief information on usage and navigation at the beginning of the HTML report. These are explained in more detail at this point.

Based on the main heading (topic or title of an online survey), the HTML report was structured as follows:

- Notes for screen reader users (heading level 2)
- Change display (heading level 2) to switch from chart view to table view and vice versa.
- Filters (heading level 2). After activating one or more filters, this area contains a tabular representation of all activated filters as well as additional options for deactivating all filters or only individual filters.
- Results (heading level 2) supplemented by topic or title of the online survey. In this section you will find the concrete data.
- Participation (heading level 3) informs about the number of participants of a survey.
- The individual question groups (heading level 3) are implemented as expandable areas. When you open the HTML report, the first group of questions is already expanded by default. It is possible to expand several or all question groups at any time.
- The questions asked (headings level 4) are directly followed by the corresponding data tables. All data tables have a uniform structure and contain the answer options in the first column, checkboxes for activating filters in the second column and the result in the third column.
- Each table is followed by the Statistical Data section (Level 5 heading). The heading was textually supplemented by the question asked.

You can navigate the HTML report using the "H" key as well as the quick navigation based on the heading levels. You can either expand all question groups and navigate the HTML report as a whole or expand only those question groups that are of particular interest and navigate to questions or statistical data based on the heading levels.

Due to the numerous dynamic filter functions, feedback for screen reader users after each individual filter activation has been omitted to avoid redundancies and to work with the HTML Report in a more ergonomic way. However, you can always reach the filter (heading level 2) via the quick navigation. It is located directly and linearly read from top to bottom before the heading "Results..." (heading level 2).

You currently achieve the best user experience with the combination Firefox+NVDA or IE11+JAWS.

Navigating in HTML-Report with HeadingsMap

Due to the uniform structuring of both views via headings, it is also possible to navigate all areas with supplementary browser add-ins. Keyboard users as well as visually impaired users can install the "HeadingsMap" add-in free of charge as required, for example. After installation, it displays the overall structure of the HTML-Report in a frame on the left.

Please note that HeadingsMap only displays the headings in expandable areas if you have previously opened these question groups.

How to install HeadingsMap in Firefox Browser:

- Call the Firefox menu in the upper right corner
- Select Add-ons
- Enter "HeadingsMap" in the "Find more add-ons" input field at the top and activate the search
- Select the "HeadingsMap" entry in the search results and start installation
- After successful installation you will find an icon to the right of the browser address bar that looks like this (h/).

You can also go directly to the HeadingsMap extension add-ons page (https://addons.mozilla.org/de/firefox/addon/headingsmap/) and start the installation process directly.

You can turn HeadingsMap on or off as needed by clicking the icon next to the address bar.

How to install HeadingsMap in Google Chrome

The easiest way to install HeadingsMap in Google Chrome is by visiting the HeadingsMap extension add-ons page (https://chrome.google.com/webstore/detail/headings-map/flbjommegcjonpdmenkdiocclhjacmbi).

After that, follow the installation process.

4.7.3. The PDF Report

In addition to the HTML report, the PDF report is also immediately available in evasys as soon as results are available. The report gives you an overview of your survey's results by means of different elements. For feedback on the evaluation results, a PDF report is usually sent by email to the relevant people. In evasys you can also automate this dispatch. You can of course, as with any PDF file, save the report in your file system and send it yourself through your email account. (Saving the PDF report in your system, however, this entails that upon scanning of further data the PDF report in evasys and your saved version will differ. Because only the report in evasys will be automatically updated.)

It is important to remember that reports are never stored in the system. As soon as you click on the respective buttons, evasys creates the report based on the current available raw data. This means that you can scan new data in at any time and the reports are modified accordingly. If you wish to avoid the scanning of further data and so modifying the PDF report, its best to simply close the survey.

Hint:
If you wish to get an impression of a specific type of report, (for example whilst creating particular types of reports) it suffices to create an online survey, fill in a questionnaire and send it. With this data alone, reports can be created.

The predefined **evasys PDF Report** can be adapted with configuration settings to customize the report. This applies to the components of the report, which can be enabled or disabled as well as the presentation. The configuration of the PDF reports can only be done by the administrator. Subunit administrators can copy the **evasys PDF Report** ("System Settings/Report Settings") and adapt it for their own subunit. For more information see chapter B 4.7.6. "General Settings".

With **PDF Report Definitions**, reports can be restricted, sub-groups created, and other recipients determined. For more information see chapter B 4.7.9. "PDF Report Definitions".

In addition, with **PDF Report Plug-ins** it is possible to realize fully customized reports. For more information see chapter B 4.7.9. "PDF Report Definitions".

Furthermore, the PDF Report can be influenced by questionnaire-specific settings (see chapter B 5. "Phase 4: Advanced Reporting").

Before contemplating the various configuration options and settings, it is useful to consider the **Report Settings** in more detail.

4.7.4. Report Settings

Further more you can edit, copy and delete the existing PDF reports in the menu "System Settings/Tools/Report Settings". These settings can be made individually for each existing PDF report.

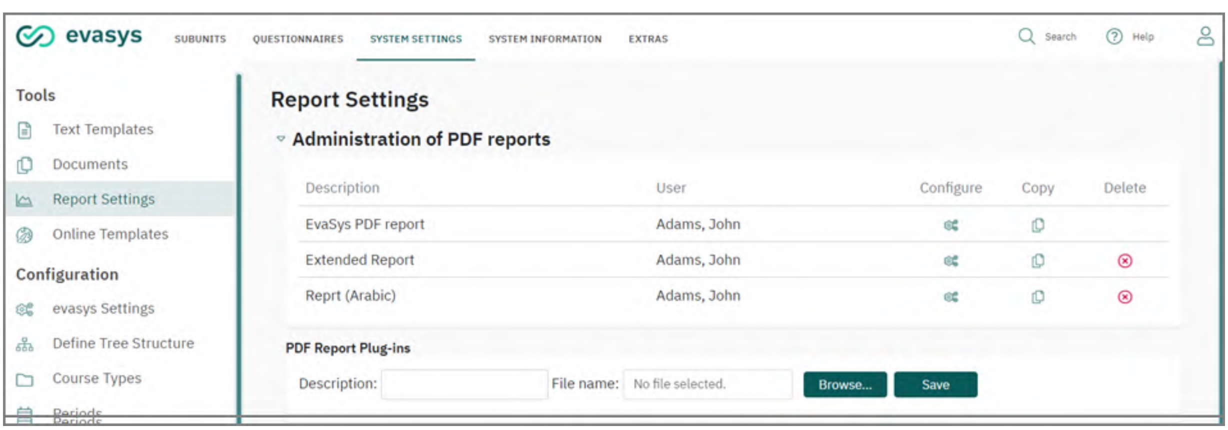


Figure 410: Report Settings

Click on the configuration icon of the selected PDF report to open the report editor. Changes to the layout as well as activating/deactivating of single components can be done here.

Furthermore, the options "Copy" and "Delete" are available in the report settings for the existing PDF reports. Please note, with regard to the original standard PDF report present in the system, you are only able to change the configuration. This report can neither be edited nor deleted.

Hint:
By copying the evasys PDF Report, new report templates with individual settings can be created.

After clicking on the configuration icon in the report settings, the report editor opens. On the following pages you receive more detailed information on the single setting options and report components.

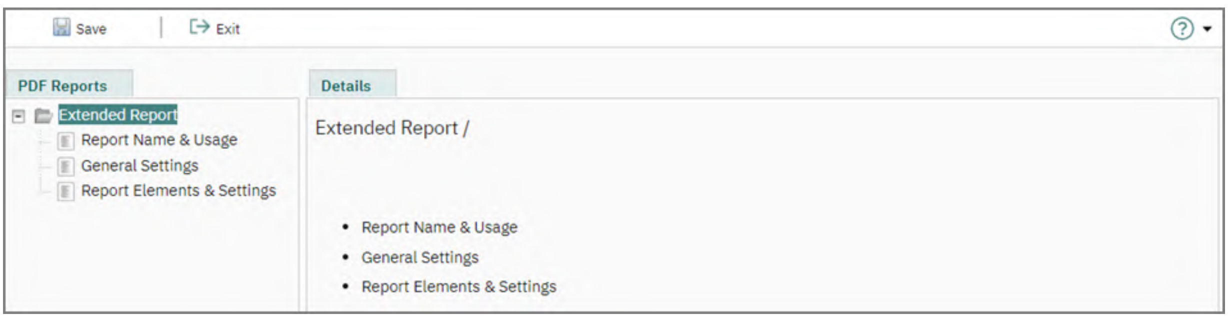


Figure 411: Report Editor

The header contains two buttons for "Save" and "Exit". Please note that the report editor does not save automatically. Click the "Save" button to save your settings. If you click on "Exit" without saving your changes, you will be prompted to do so.

There are three sections on the left side menu:

- Report Name & Usage
- General Settings
- Report Elements & Settings

4.7.5. Report Name & Usage

Multiple selection is possible by pressing the [Ctrl] key. The report configuration can later only be used for surveys with questionnaires which are selected here. You can specify in the questionnaire details of each questionnaire which PDF report is to be defined as default. The default report is the one that is used when you click on the PDF symbol or send from the survey list.

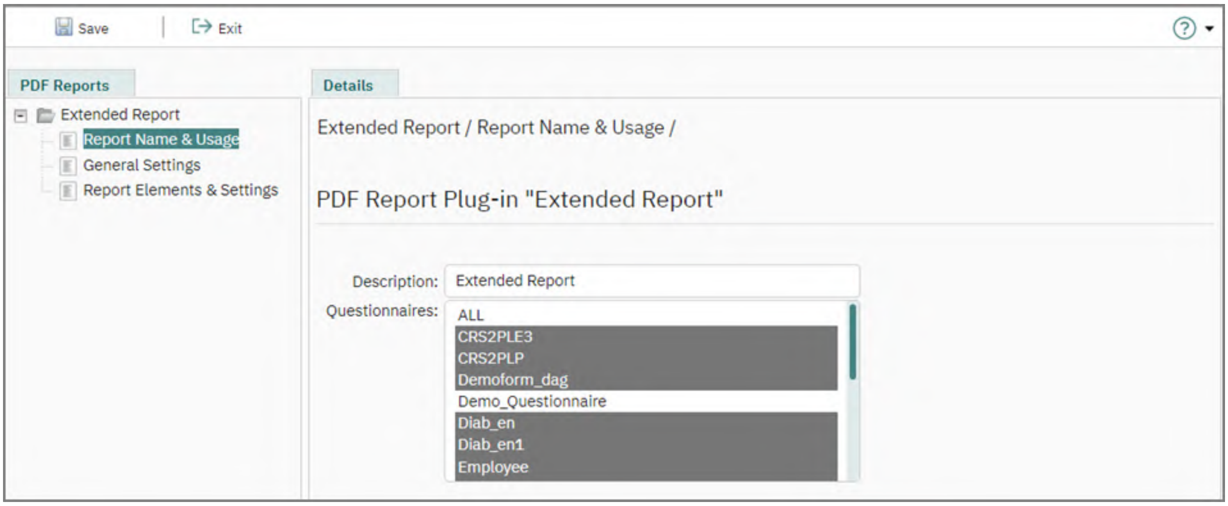


Figure 412: Report Editor - Report Name & Usage

4.7.6. General Settings

In the "General settings" area you will find all configuration options that refer to the report as a whole and not to a single report section or a single report element.

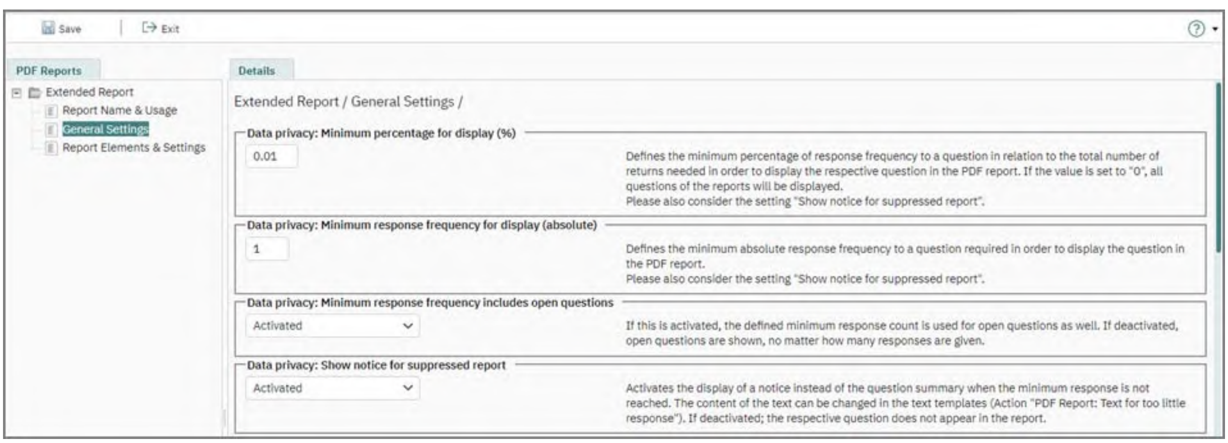


Figure 413: Report Editor - General Settings

The following settings are available:

- Data privacy: Minimum percentage for display (%)

  Defines the minimum percentage of response frequency to a question in relation to the total number of returns needed in order to display the respective question in the PDF report. If the value is set to “0”, all questions of the reports will be displayed.

  Please also consider the setting “Show notice for suppressed report”.

- Data privacy: Minimum response frequency for display (absolute)

  Defines the minimum absolute response frequency to a question required in order to display the question in the PDF report.

  Please also consider the setting “Show notice for suppressed report”.

- Data privacy: Minimum response at response level

  Defines the minimum responses per option. If there are less responses, filtering by option is not possible for the given question.

- Data privacy: Minimum response frequency includes open questions

  If this is activated, the defined minimum response count is used for open questions as well. If deactivated, open questions are shown, no matter how many responses are given.

- Data privacy: Show notice for suppressed report

  Activates the display of a notice instead of the question summary when the minimum response is not reached. The content of the text can be changed in the text templates (Action “PDF Report: Text for too little response”). If deactivated; the respective question does not appear in the report.

- Archiving: PDF/A Conformity

  If activated, the PDF report supports the standard PDF/A-2b. Please note, that when using your own PDF templates, the PDF report is no longer PDF/A-2b compatible. This applies to reports whose cover letters are modified with your own PDF templates (under “Settings/Documents” and “Settings/Text Templates”).

- Bar Color: Color of the 1st to 11th answer option

  Defines the color that is used for each answer option for scale questions in the following representations: Stacked bar diagram, Multicolored histogram, Presentation template

  If a scale question has less than eleven response options, the colors are reduced from the outside inwards. When setting a different scale length, the system ensures that the polarity still fits and only the intermediate stages are omitted.

1	2	3	4	5	6	7	8	9	10	11
x										x
x					x					x
x			x				x			x
x		x			x			x		x
x		x		x		x		x		x
x		x	x		x		x	x		x
x	x		x	x		x	x		x	x
x	x	x		x	x	x		x	x	x
x	x	x	x	x		x	x	x	x	x
x	x	x	x	x	x	x	x	x	x	x

Figure 414: Colors used according to scale length

The colors are also used in the stacked bar diagram of the indicators and in the presentation template.

Note:
Only one color setting per report configuration is possible. When using questions with different scale directions and/or bipolar scales (average value is positive) at the same time, the use of colored histograms or color stacked diagram graphs may be misleading

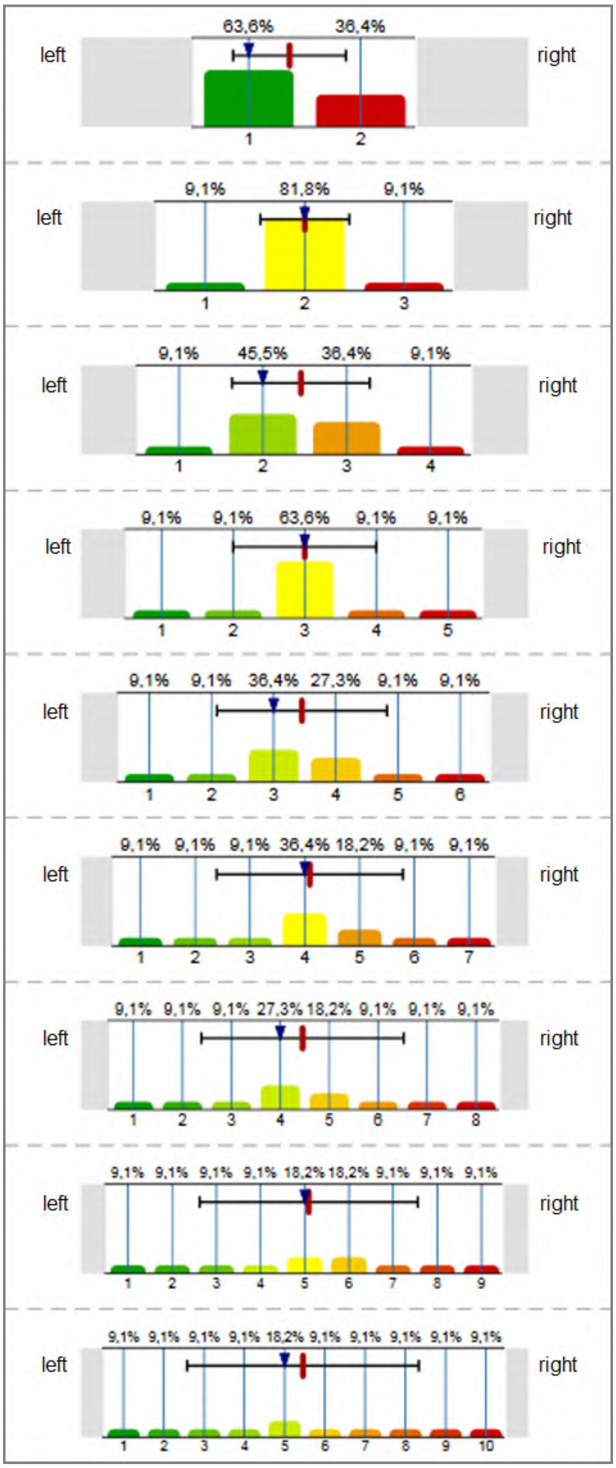


Figure 415: Examples for colored scales

- Margin

  Left, right, top and bottom margin for all pages on the PDF report
- Font size

  Font size of texts, pole texts and for average (av), standard deviation (s) and frequency (n) in the PDF reports
- Layout: Right to left

  If activated, the order of all elements of the report are mirrored. Question texts are displayed on the right, diagrams on the left etc. This mode opens PDF reports in right-to-left languages like Arabic.

4.7.7. Report Elements & Settings

The section “Report Elements & Settings“ provides the main settings of the report editor. It offers various options for managing the displayed contents of the report.

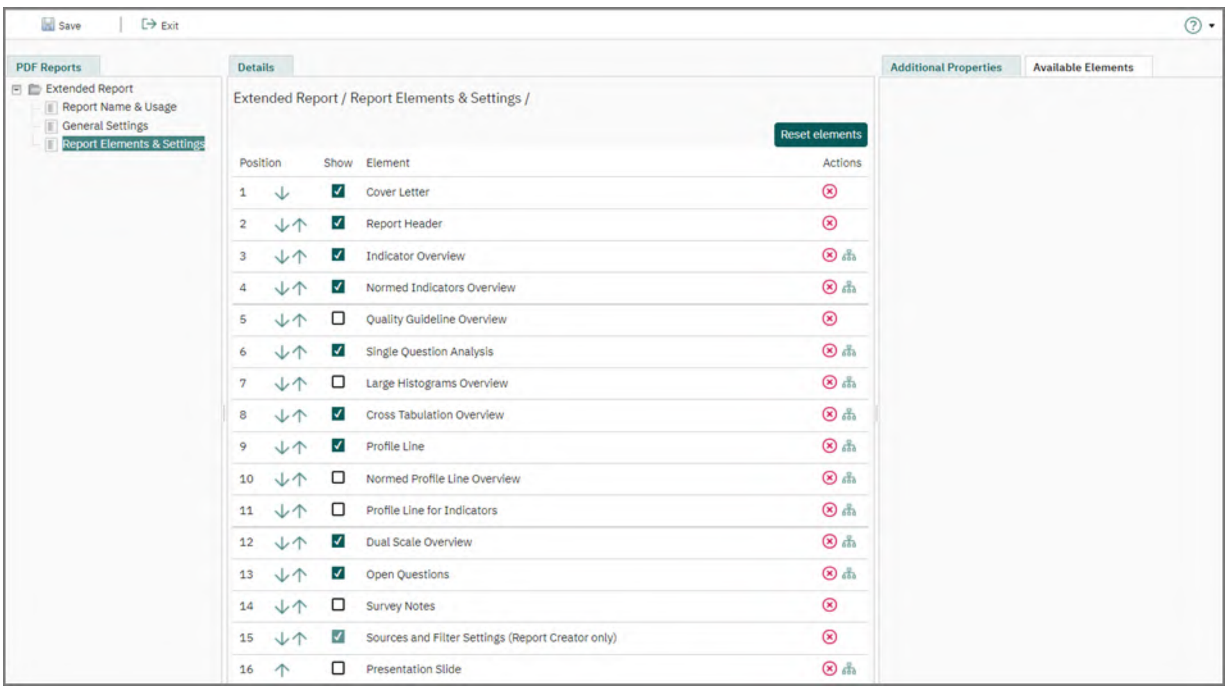


Figure 416: Report Editor - Report Elements & Settings

The middle area of the window displays an overview of all report sections available in the current report configuration. If a section is not yet included, you can drag and drop it from the "Available Elements" side menu on the right.

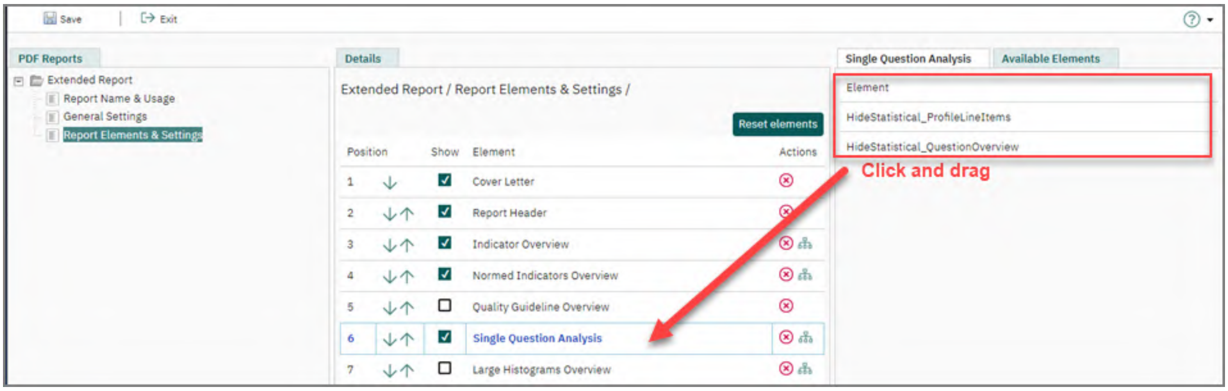


Figure 417: Available Elements

The individual report elements can be activated or deactivated using the check boxes. In this way it is possible to show different areas for comprehensive reports or hide them for shorter reports The order of the elements in the report can also be moved by drag and drop or by using the blue up and down arrows in the left column "Position".

If you move to an element, a tool tip appears which gives you brief information about the element. If you click on an element, the related properties open in the right menu. Here you can make further settings for the element.

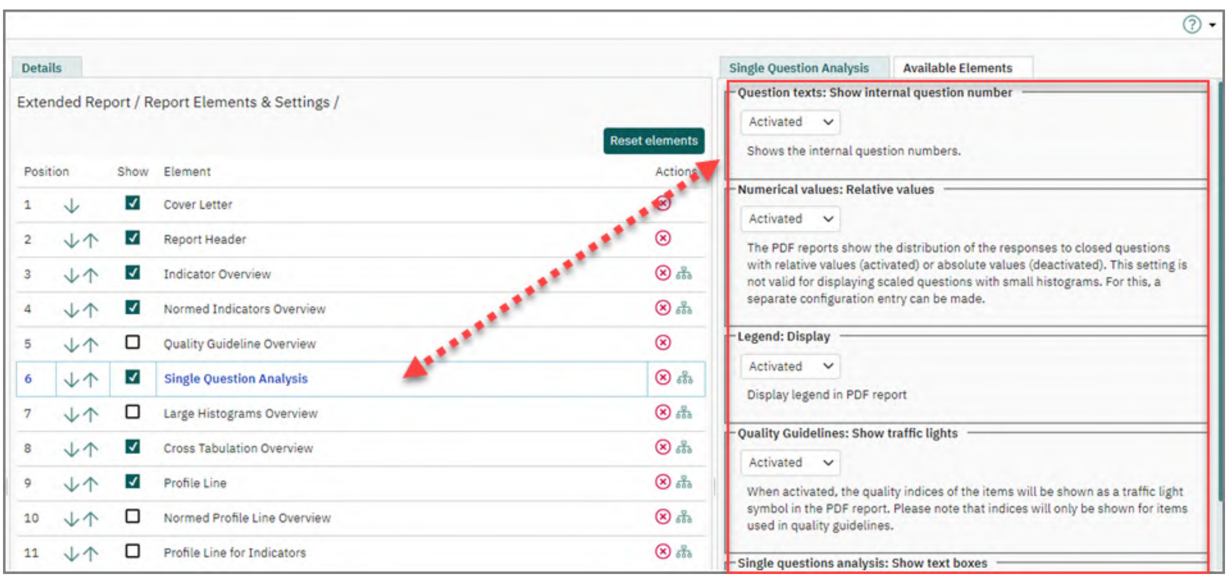


Figure 418: Attributes of an Element

Some of the elements in the overview have additional sub-elements, which themselves can have additional properties. In this case, a blue icon is displayed in the “Actions“ column on the right. By clicking on the icon or alternatively by double-clicking on an element, you reach the level below and can make further settings there. The element "Single Question Analysis" for example, has different question types (e.g. scaled questions or open questions) as sub-elements.

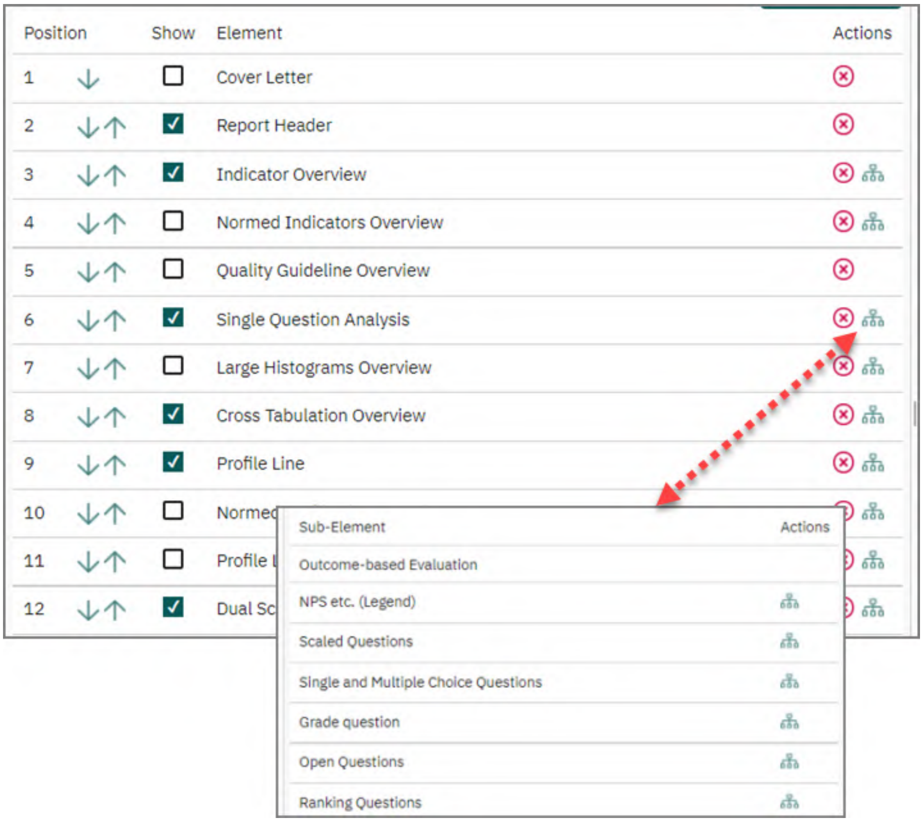


Figure 419: Display of Sub-Elements

The following sections provide an overview of all report elements with the corresponding setting options in the properties menu.

In addition to the switches which are set active by default, many of the elements have sub-element switches which are disabled by default, as shown in the following example:

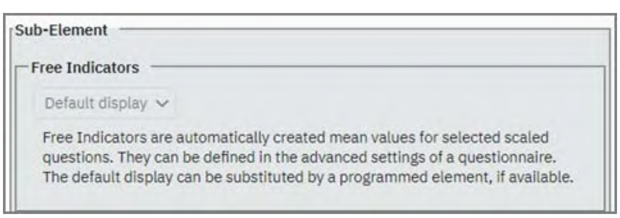
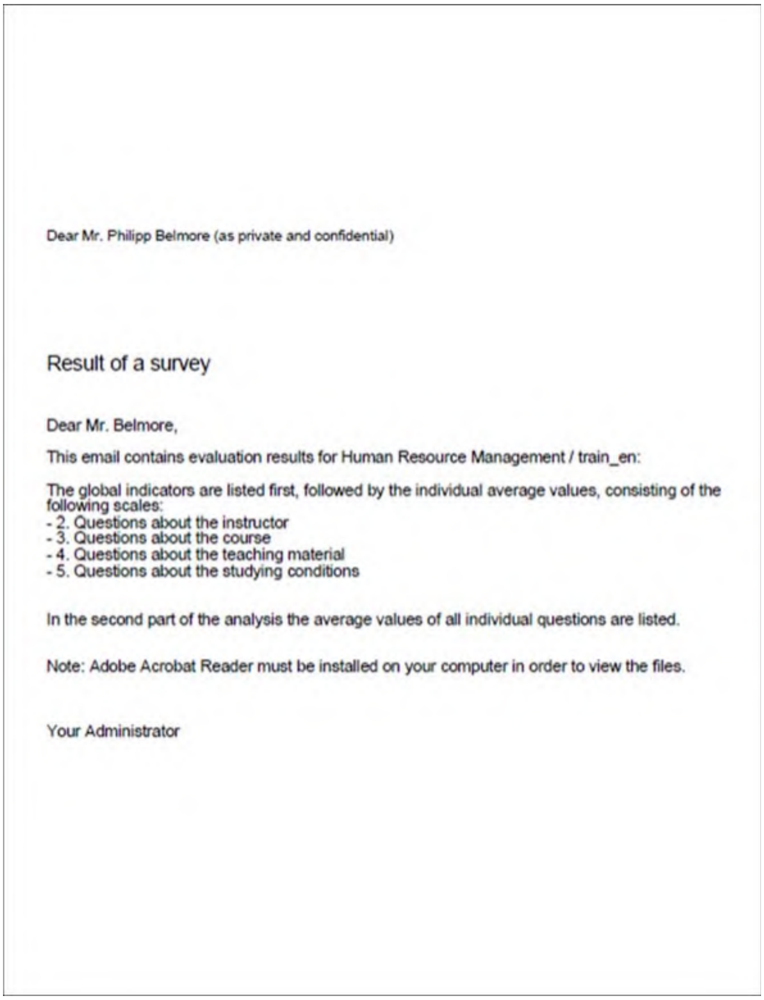


Figure 420: Example Sub-Element

These switches can be used to replace the standard representations of individual elements with an alternatively programmed element. This makes the PDF report even more flexible and can be adapted to your own needs. Currently, programmed elements can only be provided by evasys GmbH. As long as no programmed element is uploaded, the switch is inactive. For this reason, this manual does not include the documentation of the sub-elements.

Cover Letter

The cover letter can be used as an introduction for the report. The content can be defined with the help of text templates. The sender data, which can be defined on the right side, is displayed in the header of the cover letter when no individual PDF template is used.



Dear Mr. Philipp Belmore (as private and confidential)

Result of a survey

Dear Mr. Belmore,

This email contains evaluation results for Human Resource Management / train_en:

The global indicators are listed first, followed by the individual average values, consisting of the following scales:
- 2. Questions about the instructor
- 3. Questions about the course
- 4. Questions about the teaching material
- 5. Questions about the studying conditions

In the second part of the analysis the average values of all individual questions are listed.

Note: Adobe Acrobat Reader must be installed on your computer in order to view the files.

Your Administrator

Figure 421: PDF Letter: Sample

- Sender above recipient address

  Sender name on cover letter in PDF report

- Sender part 1, 2 and 3

  Organization Name (Part 1), postal address (part 2) and footer (Part 3, below postal address)

Report Header

The report header is used to display the meta data of the survey (name of the survey, number of returns etc.). The content is defined by a text template. On the right side, you can do some layout settings.

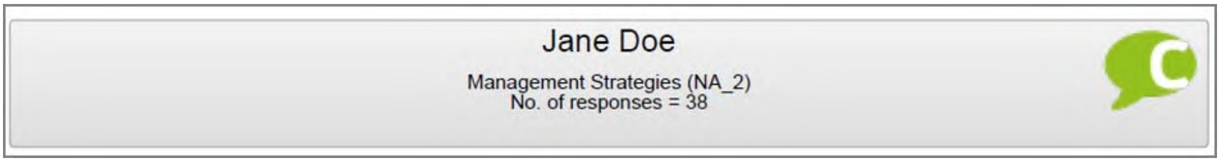


Figure 422: PDF Report – Report Header

- Report header: Background color

  Color setting in order to adjust logo background color

- Report header: Color progression

  If this function is activated, then the background color in the header of the report starts at the set background color and lightens gradually towards the top of the page. If this function is deactivated, then the background color remains consistent.

- Report header: Subunit logo alignment

  Defines whether the subunit logo will be at the left or right in the PDF report.

Indicator Overview

The indicator overview displays the mean values of question groups, if the calculation of indicators has been activated in the question group settings of the questionnaire, or if free indicators have been defined in the questionnaire details.

- Indicators: Display

  If the questionnaire supports the calculation of indicators, the indicators can be displayed at the beginning of the PDF report. A general average value is also displayed, which merges the indicators to generate a total average value (the latter can be activated/deactivated using Hide global index). This function should only be used with questionnaires which have been developed to average individual questions within a category.

- Indicators: Display Cronbach´s Alpha

  When “Indicators: Display” is also activated, this option shows/hides Cronbach´s Alpha.

- Indicators: Hide global index

  If this option is activated the global index will not be displayed.

- Indicators: Left pole

  Text for left pole of the indicators. Default value for the left pole is ´-´. The pole will also be displayed in the presentation template.

- Indicators: Right pole

  Text for right pole of the indicators. Default value for the right pole is ´+´. The pole will also be displayed in the presentation template.

- Indicators: Create profile line

  Activates the display of the profile line for indicators in the PDF report.

- Indicators: Display stacked bar diagram

  When activated, besides the classic indicator display (mean and standard deviation) is a stacked bar chart to visualize the percentage distribution of answers displayed.

  Please note that with this setting, the given space for the pole label will decrease. We recommend in this case, under "Indicators: Left Pole" and "Indicators: Right Pol", to set the default values (+ and -).

  Please also note the possibility of individual color configuration of the bars under "bar color. Color of the following response option".

  A stacked bar diagram is displayed for the overall indicator only if all indicators have the same scale width.

The indicator overview offers the following sub-elements:

Free Indicators

Free indicators are automatically calculated mean values for selected scaled questions which can be defined in the advanced settings of the questionnaire.

Question Group Indicators

Question group indicators are automatically created mean values for all scaled question of the same scale within one question group. They are set in the questionnaire for each question group.

For both sub-elements, no further settings are available. However, they can be completely or partially replaced by a programmed element.

Normed Indicators Overview

The overview on normed indicators can be displayed if norms have been defined for a questionnaire in the questionnaire details. The norming results are shown on question group level in a tabular and graphical form.

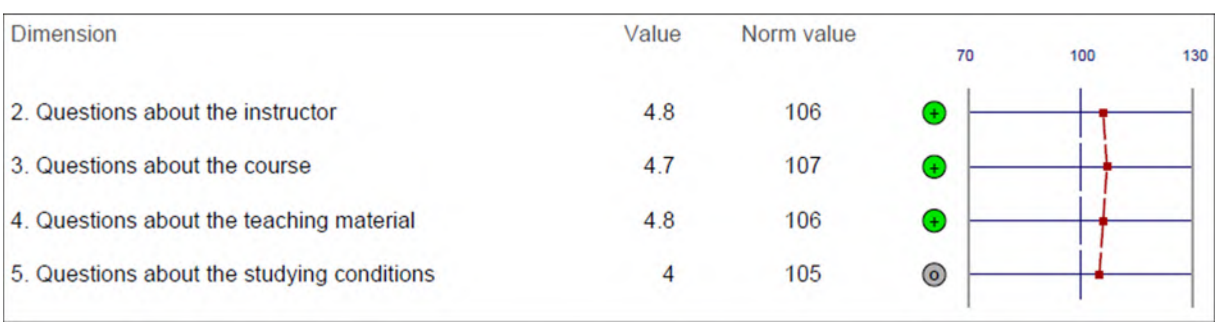


Figure 423: Normed Indicators

- Norming: Mode of calculation for norming

  1 - Mean value of the dimension = Mean values of all datasets

  2 - Mean value of the dimension = Mean value of the mean values of the data sets. Please note: In this case in each dataset the number of answers for each item

must be at least as high as a defined minimum value (see also Configuration of Norming).

- Norming: Minimum percentage of given answers to enable norming

  Percentage of answers required for norming. If fewer answers are given, the norming for this dimension cannot be implemented

  Attention: The setting is recognized only when the option “Norming: Mode of calculation for norming” is set to (1).

- Norming: Pole reversal of scales when creating norms

  If the alignment of the poles is different for different questions (i.e. positive answers are not always on the same side, negative not always on the other), you can despite this enforce a standardized display of the norm profile line. This simplifies the interpretation of the results. For this purpose activate the option “Pole reversal of scales when taking norms”. If you activate it, the scales of those dimensions/ items where smaller values are considered as positive and bigger values as negative are reversed.

  If smaller values (i.e. values left of the norm) are positive, the values are reversed. All amplitudes of the normed profile line on the right side of the norm can be interpreted as positive evaluation results. Accordingly the values left of the center are negative. Please note: The reversed values are also taken for the calculation of the mean values.

  An exception here are questions in which the middle of a scale represents the best value (e.g. the question "Was the number of presentations appropriate?" and the scale options: "too few - just right - too many").

Quality Guideline Overview

The overview on quality guidelines can be displayed if quality guidelines have been defined for a questionnaire in the questionnaire details. The results are then displayed in a tabular overview. For each quality guideline, the percentage value and a result graphic will be shown.

The overview does not offer any other setting options.

Quality Guideline

	Weight	Items without Deduction	Result
2. Questions about the instructor	25%	3 of 4	98.4%
3. Questions of the quality of the course	25%	1 of 4	90%
4. Questions about the refectory	25%	5 of 6	96.6%
5. Question about the studying conditions	25%	3 of 4	100%

Overall Result: 96.3%

Figure 424: Quality Guidelines

Single Question Analysis

The single question analysis is the main part of the report. For each closed question of the questionnaire it displays the results as a graphic and presents selected statistical values.

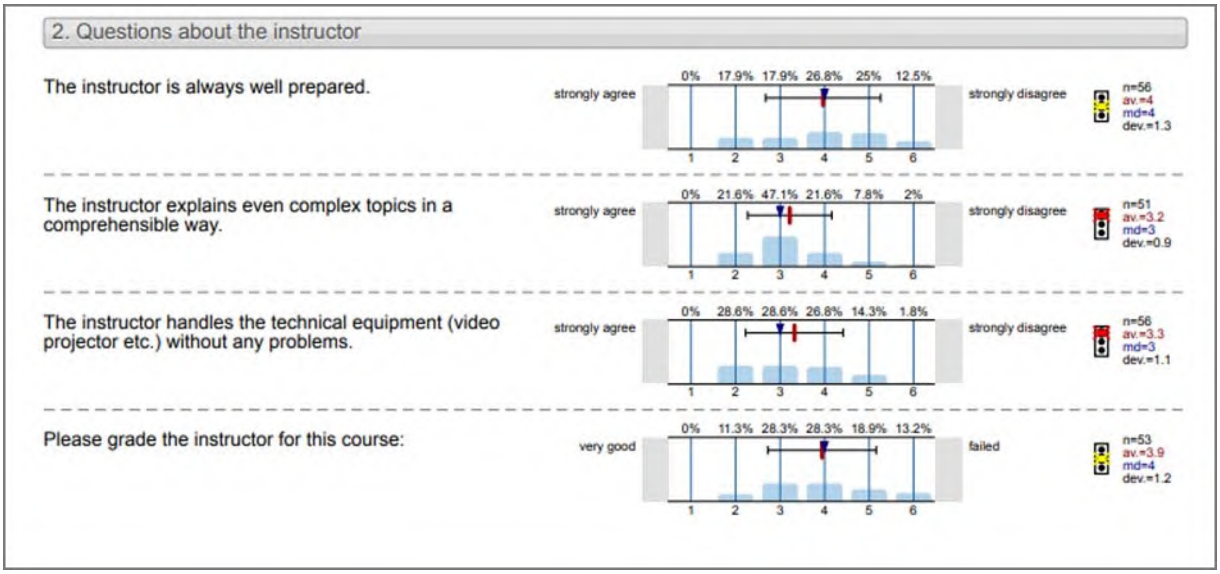


Figure 425: Single Question Analysis

- Question texts: Show internal question number

  Shows the internal question numbers.
- Legend: Display

  Display legend in PDF report
- Quality Guidelines: Show traffic lights

  When activated, the quality indices of the items will be shown as a traffic light symbol in the PDF report. Please note that indices will only be shown for items used in quality guidelines.
- Single questions analysis: Show text boxes

  If activated the textbox of VividForms forms will be shown in the PDF report.

- Display mode for open questions

  Defines if the results of open questions are displayed in their own report section separated from the closed questions, or if they are included in the single question analysis.

  Please note: If you set this option to "Display combined with the closed questions", please deactivate the overview of open questions. Otherwise they will show up twice in the report.

  The following **sub-elements** are available:

  Legend for Scaled Questions

  To allow an easier analysis of scaled questions, a legend can be activated and configured which explains the structure and values of the histograms.

  - Legend: Divisions
    Scale divisions of the legend
  - Legend: Values
    Value given in the legend. The number of values must match the scale divisions.

The legend can be completely or partially substituted by a programmed element, if available.

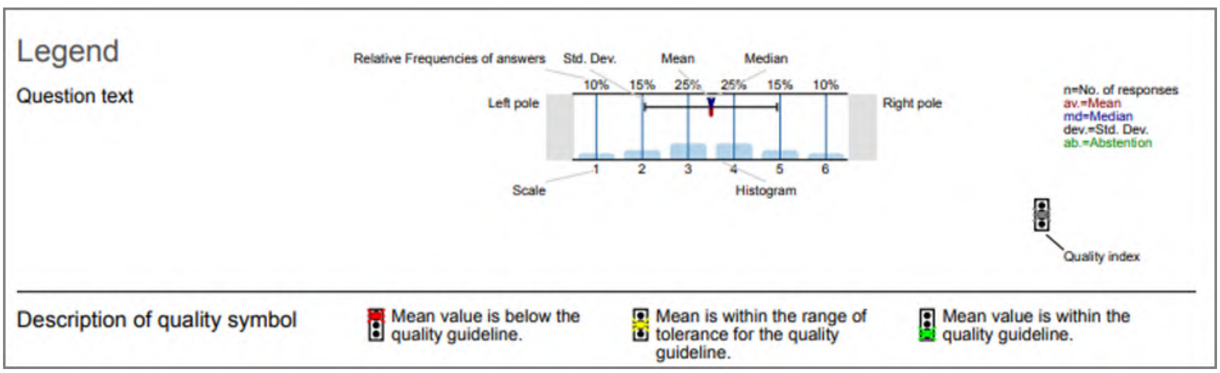


Figure 426: Legend

  Scaled Questions

  This element defines the display of scaled questions in the report.

  - Numerical values: Show quantile
    Defines if and how quantiles are displayed in the graphical analysis of scaled questions in the PDF report.
    - No Quantile
    - 10%-Quantile (Decile)
    - 25%-Quantile (Quartile)
  - Numerical values: Relative values
    The PDF reports show the distribution of the responses to closed questions with relative values (activated) or absolute values (deactivated). This setting is not

valid for displaying scaled questions with small histograms. For this, a separate configuration entry can be made.

- Numerical values: Show mean/median

  Defines if mean value, median, both or no values shall be displayed in the PDF report.

  - Mean
  - Median
  - Mean and Median
  - show no values
- Numerical values: Procedure to calculate the mean value

  The procedures to compute the mean value for the PDF report are defined here.

  - Default (arithmetic mean)
  - Trimmed mean (arithmetic mean trimmed by 10%)
- Numerical values: Bar Mean Value

  Line thickness for mean value
- Numerical values: Show standard deviation as number

  Displays the standard deviation (s).
- Numerical values: Bar Standard Deviation

  Line width for standard deviation
- Numerical values: Decimal point precision

  Number of digits after the decimal point for averages and standard deviation.
- Numerical values: Display cumulative frequency

  Activates or deactivates the display of cumulative frequencies in the PDF report.

  For cumulative frequencies, the response percentages of selected answer options of single choice and multiple choice questions can be summed up. The value can then be displayed in the PDF report next to the corresponding question. This way, problem frequencies or satisfaction rates can be displayed.

  To calculate cumulative frequencies, you first have to adapt the variable names of the corresponding questions in the data export configuration in the questionnaire details. The variable name (e.g. V5_G) is supplemented by the number of the options which are to be summed up (e.g. V5_Go1o2, if the responses of option 1 and 2 are to be added up).
- Single questions analysis: Scaled questions - Show bar diagram with histogram

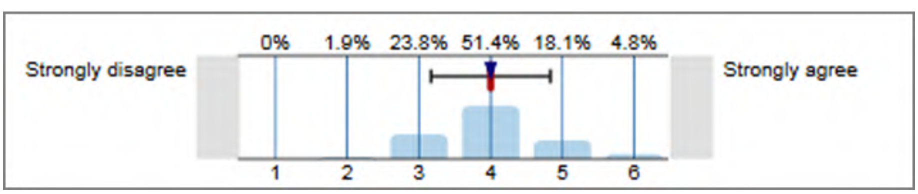
  When enabled, the scale questions are displayed by histograms in the PDF report. When disabled, the questions are displayed with a simple flat bar diagram.

  This option is only relevant if you have selected in VividForms editor for scale questions the diagram type “histogram”. Do you have selected a different diagram type (bar, pie, line or ring diagram) this chart type will be displayed, regardless of this configuration setting.

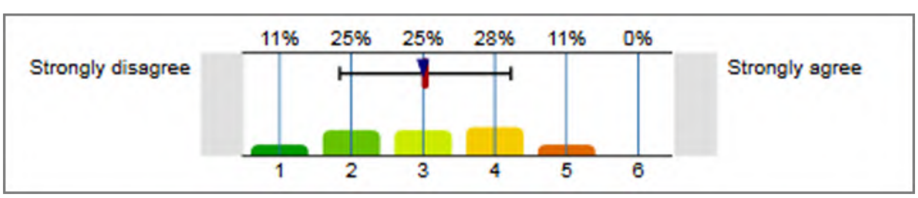
- Single questions analysis: Scaled questions - Absolute and Relative Values
  Defines the display of relative and absolute values for scaled questions. This setting only affects the presentation of scaled questions with small histograms.
  - Only absolute values
  - Only relative values of
  - Absolute and relative values
- Single questions analysis: Scaled questions - Show standard deviation in graph
  Show the standard deviation in the graph of scaled questions.
- Single questions analysis: Scaled questions - Show scale divisions for bar diagrams
  Activates the display of the export values for response options as scale under the graphic report bar.
- Single questions analysis: Scaled questions - Bar Color for Small Histograms
  Defines the color of the bars in small histograms for scaled questions.

Beyond this, there are various diagram types available for scaled questions. The diagram types displayed in the report are defined when you create a question in the VividForms Editor or VividForms Designer. It is possible to change them afterwards in the details of a questionnaire in the PDF-Report Definition. For further information on this topic, please refer to the VividForms Editor Manual. The different diagram types are listed in the following overview:

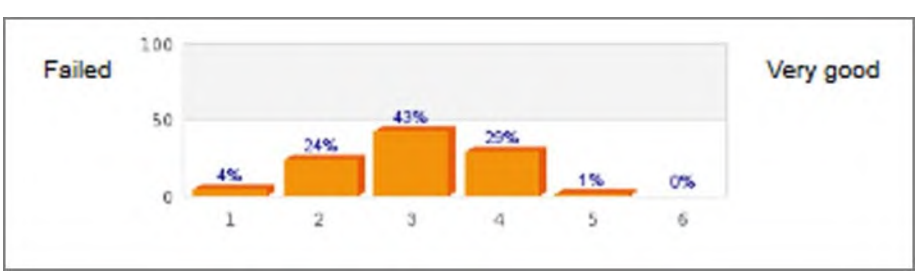
Standard Histogram:



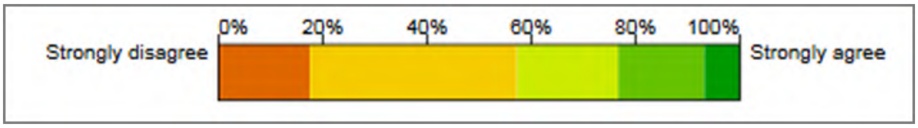
Multi-color-Histogram:



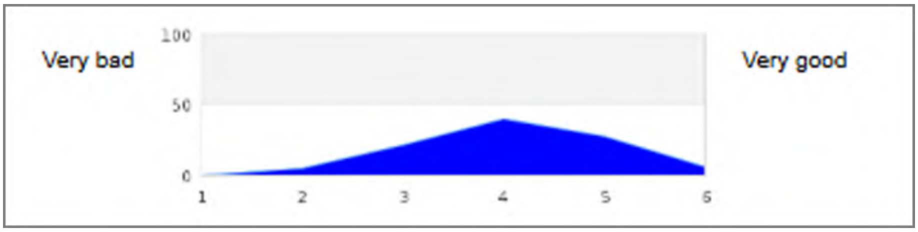
Bar Diagram:



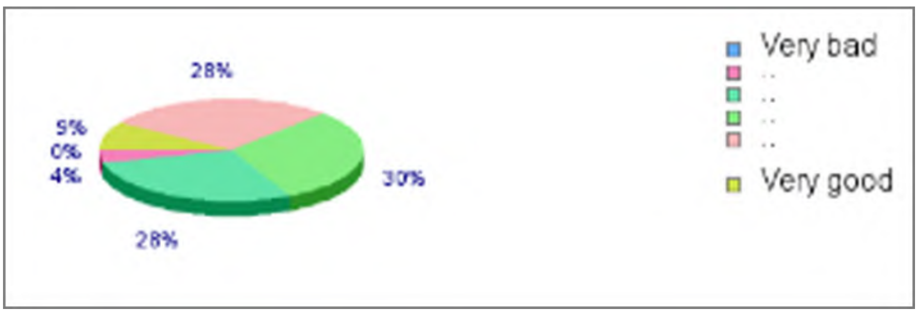
Stacked Bar Diagram:



Line Diagram:



Pie Diagram:



Donut Diagram

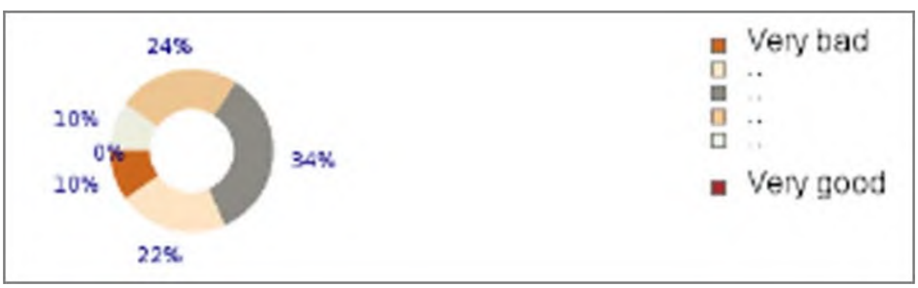


Figure 427: Diagram Types of Scaled Questions

Note:
Donut and pie charts are only available for scaled questions with a maximum of 7 options.

Single Choice and Multiple Choice Questions

This element defines the display of single and multiple choice questions in the report. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Grade Question

This element defines the display of grade value questions in the report. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Open Question

This element defines the display of open questions in the report. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Please take notice of the switches related to the sub-element "Open Question" in the overview of the open questions.The settings made here affect the display in the single question analysis.

Large Histograms Overview

The overview displays the results of all scaled questions on the questionnaire in the form of large histograms. It is an additional display mode for the analysis of scaled questions which can be used as an alternative for the single question analysis.

The overview does not offer any other setting options.

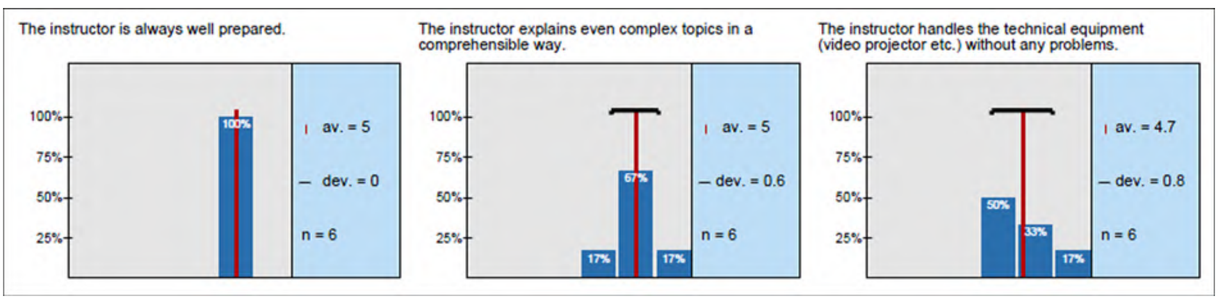
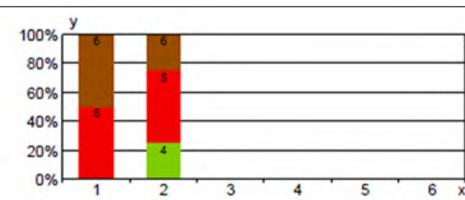


Figure 428: PDF Report: Large Histograms

Cross Tabulation Overview

The overview displays correlations of defined questions in cross tabulations, provided the cross tabulations have been defined for the questionnaire beforehand in the questionnaire details.

y / x	1	2	3	4	5	6	
1	0%	0%	0%	0%	50%	50%	100%
2	0%	0%	0%	25%	50%	25%	100%
3	0%	0%	0%	0%	0%	0%	0%
4	0%	0%	0%	0%	0%	0%	0%
5	0%	0%	0%	0%	0%	0%	0%
6	0%	0%	0%	0%	0%	0%	0%
	0%	0%	0%	16.7%	50%	33.3%	100%



x: What is your age?

1: 18-29
2: 30-39
3: 40-49
4: 50-59
5: 60-69
6: Older than 69

y: The technical equipment of the university is excellent.

1: strongly disagree
2:
3:
4:
5:
6: strongly agree

Figure 429: PDF Report: Cross Tabulations

- Show the graph

  If activated, a graph is shown next to the cross tabulation, which shows the absolute distribution of the values.

- Show absolute/ relative values

  Defines if the values in cross tabulations are displayed as absolute (integer) and/or relative (percentage) values.

  You can only display absolute and relative values at the same time if the setting "Cross Tabulation: Show the graph" is deactivated. If it is activated, the value is shown as defined in "Relative values"

Profile Line

The profile line displays the mean values or medians of scaled questions in a graphical overview. Depending on the settings, different numerical values can be displayed.

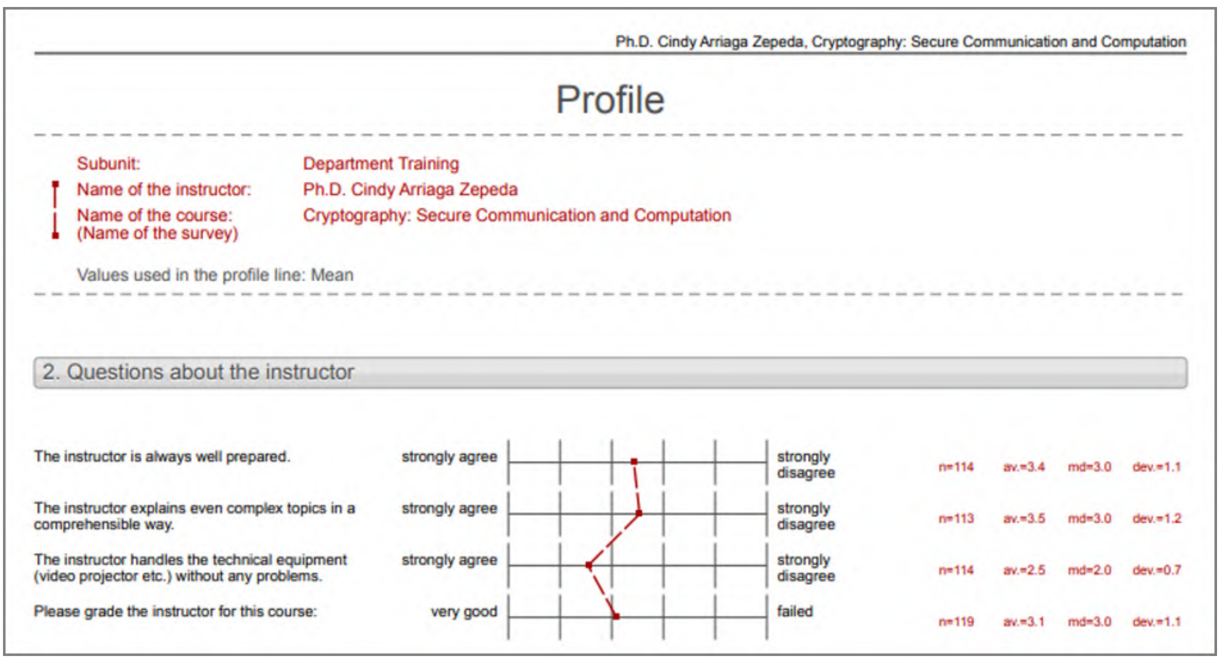


Figure 430: Profile Line

- Show median

  Activates the display of median instead of mean value in the profile line. If activated, grade value questions will not be displayed in the profile line.

  Please note: This setting will affect all profile lines display.

- Show numeric values

  Activates the display of the numeric values of median, mean, standard deviation and number of responses for the corresponding profile lines. When deactivated, only the number of responses and the mean or median – depending on the setting “Profile line: Show median” – will be displayed.

  Please note: This setting will affect all profile lines display.

- Display question groups

  If this function is activated the question groups are displayed in the profile line.

Normed Profile Line Overview

The normed profile line can be displayed if norms have been defined for a questionnaire in the questionnaire details. The normed values of all contained questions are displayed in form of line.

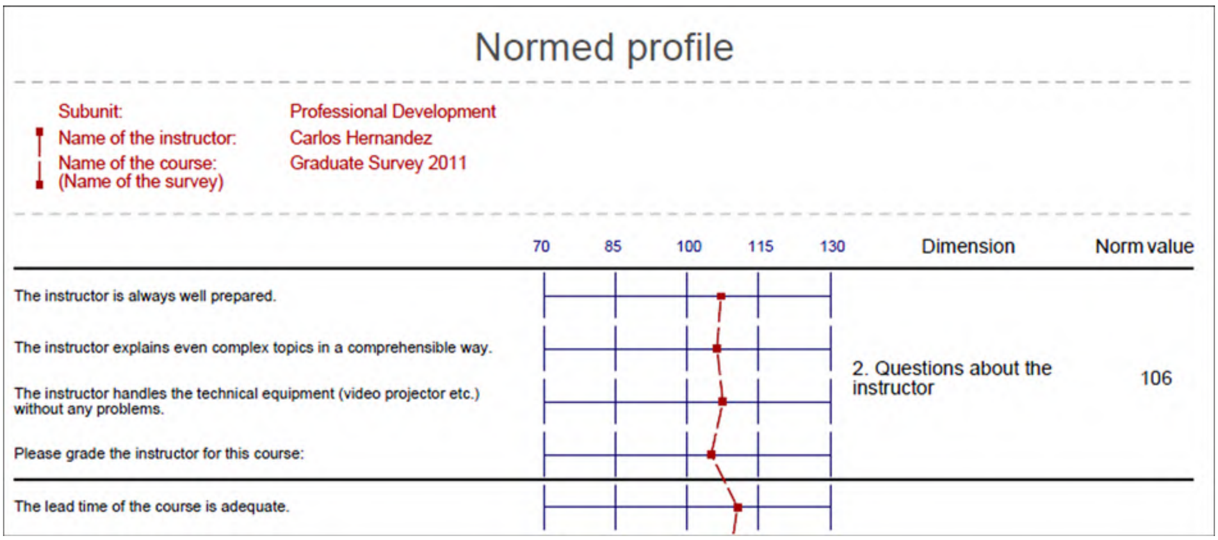


Figure 431: Normed Profile Line

- Show recommendation text

  When activated, a link for generating a recommendation document will be given under the detail norm profile line.

  The following **sub-elements** are available:

  Profile Line Header

  This element defines the display of the profile line in the report.

  The default display can be substituted by a programmed element, if available.

Profile Line for Indicators

The profile line for indicators can be displayed if the calculation of indicators has been activated in the question group settings of the questionnaire, or if free indicators have been defined in the questionnaire details. The results are displayed in form of a line.

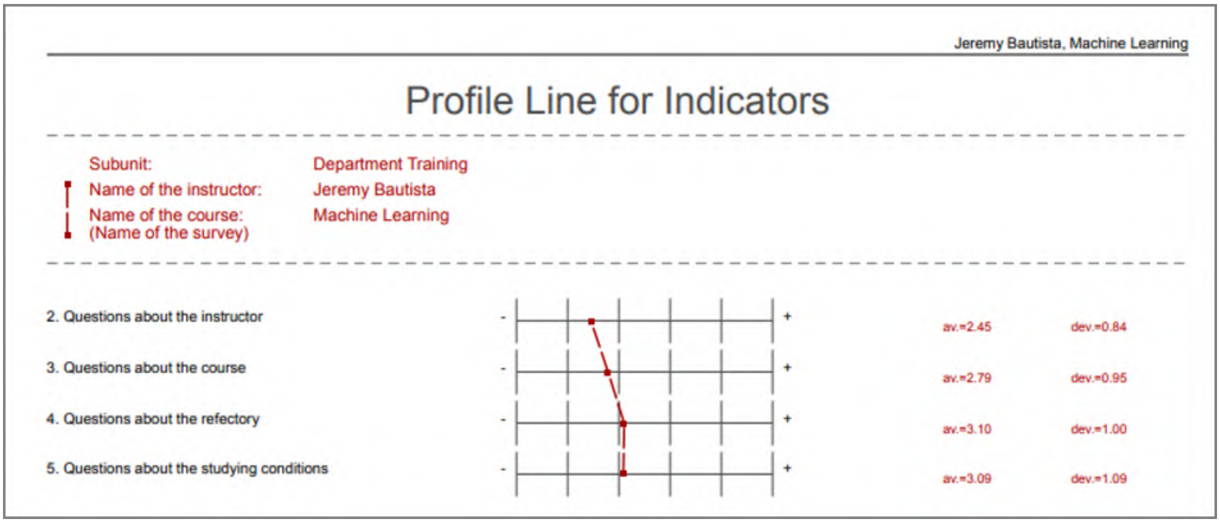


Figure 432: Profile Line for Indicators

The profile line for indicators has no additional setting options, but the following **sub-elements**:

Profile Line Header

This element defines the display of the header of the profile line in the report. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Profile Line

This element defines the display of the profile line in the report. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Free Indicators

Free Indicators are automatically created mean values for selected scaled questions. They can be defined in the advanced settings of a questionnaire. There are no further properties available, but this element can be completely or partially substituted by a programmed element.

Dual Scale Overview

The dual scale overview displays the results of dual scale questions in a graphic. As a prerequisite, dual scale questions have to be created in the questionnaire.

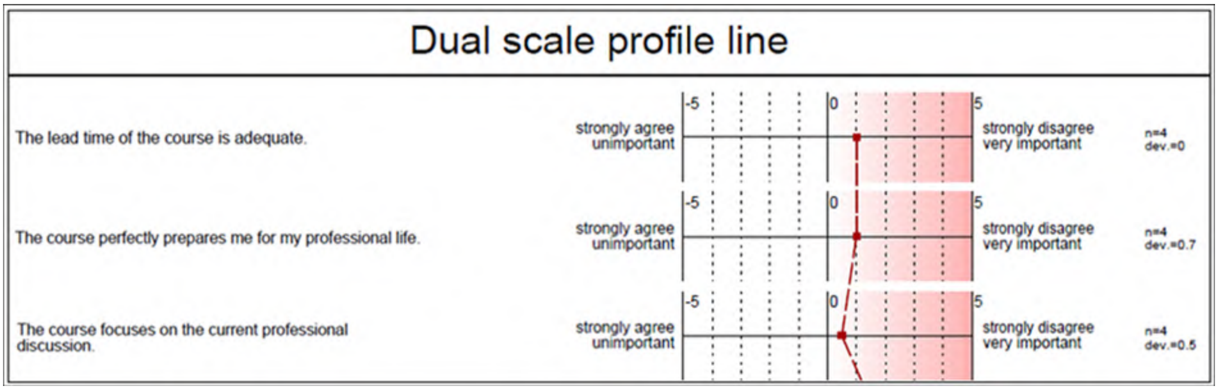


Figure 433: Dual Scale Profile Line in PDF Report

- Display of the Dual Scale Profile Line (Quality and Importance)

  Defines, if critical values of dual scale questions for quality and importance are highlighted by means of a color gradient.

  - Deactivated
  - Critical values left
  - Critical values right

The following **sub-elements** are available:

Outcome-based Evaluation

If learning outcome questions have been defined in the questionnaire with the help of dual scale questions, then this element shows a special analysis for the learning outcome.

Radar Chart for Dual Scale Questions

This element defines the display of the radar chart which is used for the analysis of dual scale questions for target-performance comparisons.

Statistical

Defines the presentation of the statistical values.

There are no further properties available for these elements, but they can be completely or partially substituted by a programmed element.

Open Questions

This setting activates or deactivates the display of the answers of open questions in the report. The type of display can be defined by help of the settings on the right.

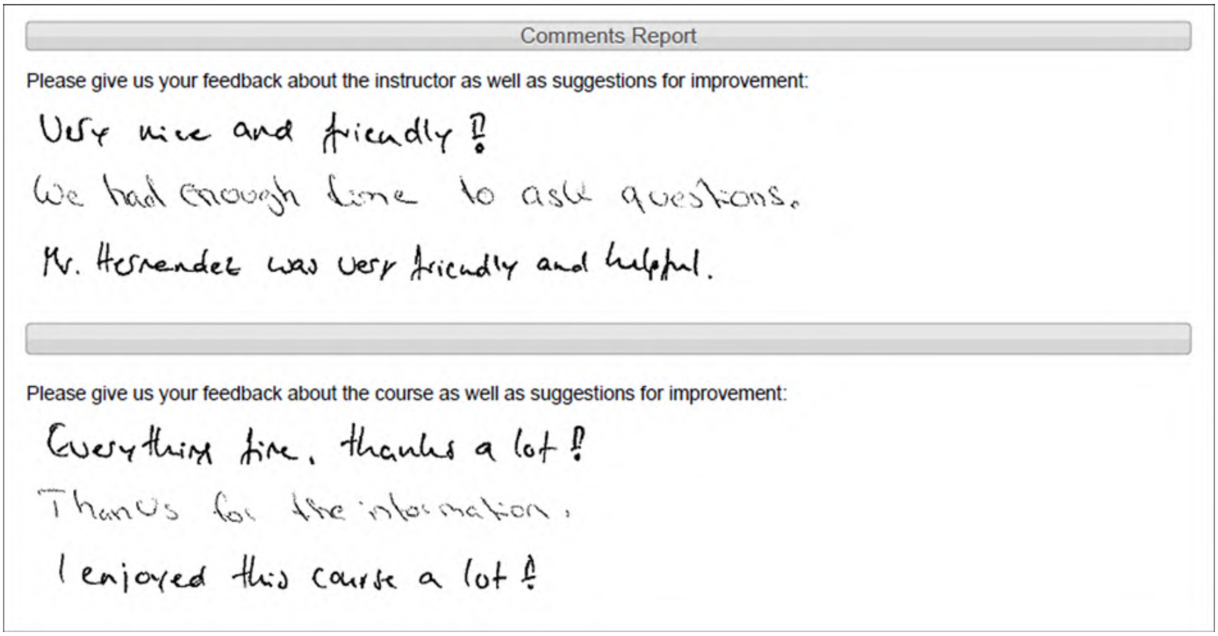


Figure 434: List of Responses to Open Questions

The following **sub-element** is available:

Open questions

- Permit listing

Listing and counting of individual comments in the report. If this option is activated, repeated entries to open comments, which have been marked as such during data entry, are displayed in a summarized form, e.g. “The course was well organized (2 Counts)”.

- Display mode for images of answers to open questions

Defines the size in which the image section of open questions is displayed in the PDF report.

Large = The images are displayed in one column.

Small = The images are displayed in two columns next to each other.

- Page Break after each open question

If activated, and, at the same time, open questions appear at the end of the report (option: “Open questions: Display”), a page break is inserted into the report before displaying the answers to each open question. In this way, clarity is enhanced, particularly when there are many answers to open questions.

Survey Notes

The survey notes are displayed in an overview, provided the administrators or instructors have stored notes for a survey.

The overview does not offer any additional setting options.

All notes of the survey

Lisa Thompson (06/14/2022 at 01:52:30 pm):

Internet was extremely slow. The room was too small for the number of participants registered for the course.

Figure 435: PDF Report: Display Notes of the Survey

Additional information on adding, editing and displaying notes can be found in chapter B 3.17.5. “Editing/Displaying Notes”.

Sources and Filter Settings (Report Creator only)

This element is only shown in aggregated reports created by the Report Creator. In the details of a summary report, you can activate or deactivate the overview on report sources and filter settings individually per report. This is why at this point you can only change the position of the overview but not the activation status.

Presentation Slide

The presentation slide presents the results of the indicators in a graphical overview in landscape format. As a prerequisite, the calculation of indicators has to be activated in the question group settings of the questionnaire, or free indicators have to be defined in the questionnaire details.

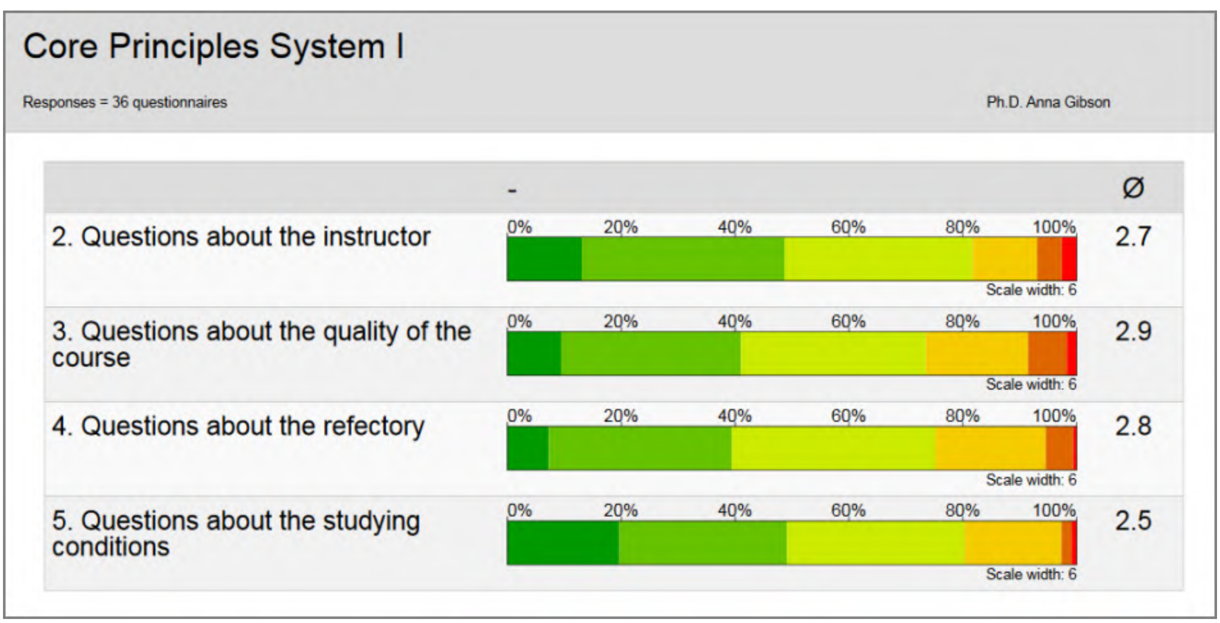


Figure 436: Presentation Template

- Font size

  Font size of texts in PDF reports/presentation slides

- Show standard deviation

  Enables or disables the display of the standard deviation on the presentation template. When activated, the standard deviation stacked bar diagram is shown narrower.

  The following **sub-element** is available:

  Free Indicators

  Free Indicators are automatically created mean values for selected scaled questions. They can be defined in the advanced settings of a questionnaire.

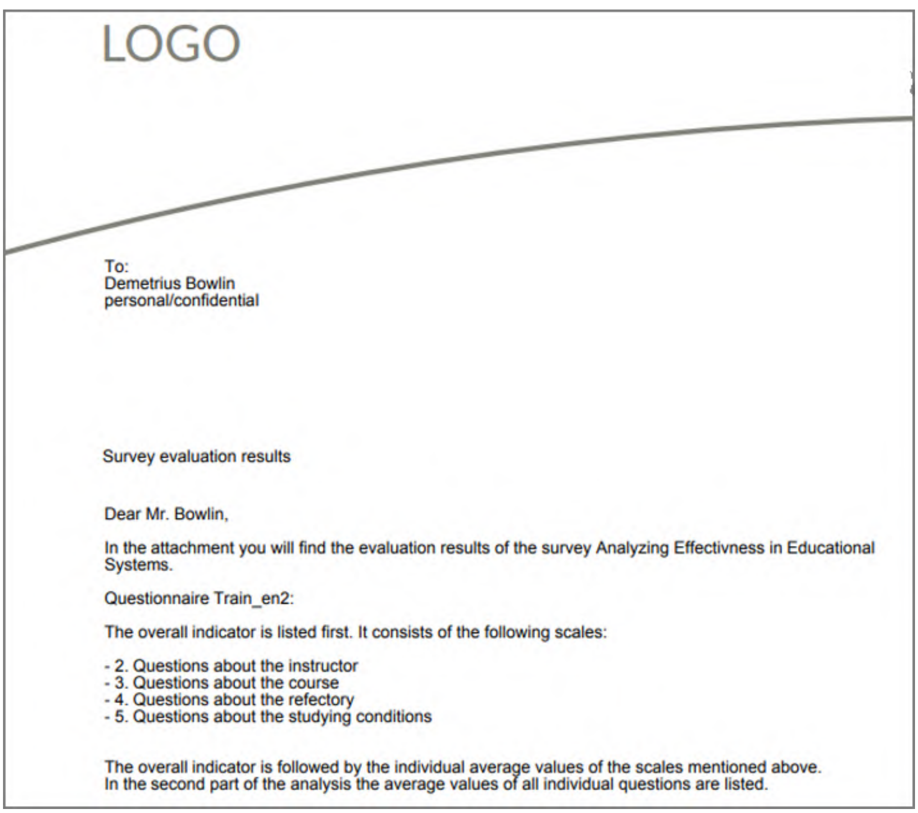
4.7.8. Specific Elements of the PDF Report

The Letter

The letter is a regular type of letter and serves as courteous piece of information for the instructor on the subsequent results of the PDF report.

If you wish to add a letter to the evaluation results, the option "Generate letter" has to be activated in the settings of the corresponding PDF report ("System Settings/Report Settings").

The following figure shows a sample letter:



LOGO

To:
Demetrius Bowlin
personal/confidential

Survey evaluation results

Dear Mr. Bowlin,

In the attachment you will find the evaluation results of the survey Analyzing Effectivness in Educational Systems.

Questionnaire Train_en2:

The overall indicator is listed first. It consists of the following scales:

- 2. Questions about the instructor
- 3. Questions about the course
- 4. Questions about the refectory
- 5. Questions about the studying conditions

The overall indicator is followed by the individual average values of the scales mentioned above.
In the second part of the analysis the average values of all individual questions are listed.

Figure 437: Cover Letter: Example

The letter consists of different components:

- the header with the address details of the sender and of the recipient

- the actual text of the letter (including a subject line and continuous text)

the letter's layout (for example with the letter head of your corporate design)

The Header of the Letter

The address details in the header (sender and recipient) are defined at two different locations in evasys:

- Recipient's address:

  The first two lines specified in the user data of the respective instructor are used as the recipient's address.

  In the following example, evasys takes the address of Donna Harwood and inserts it below the user name:

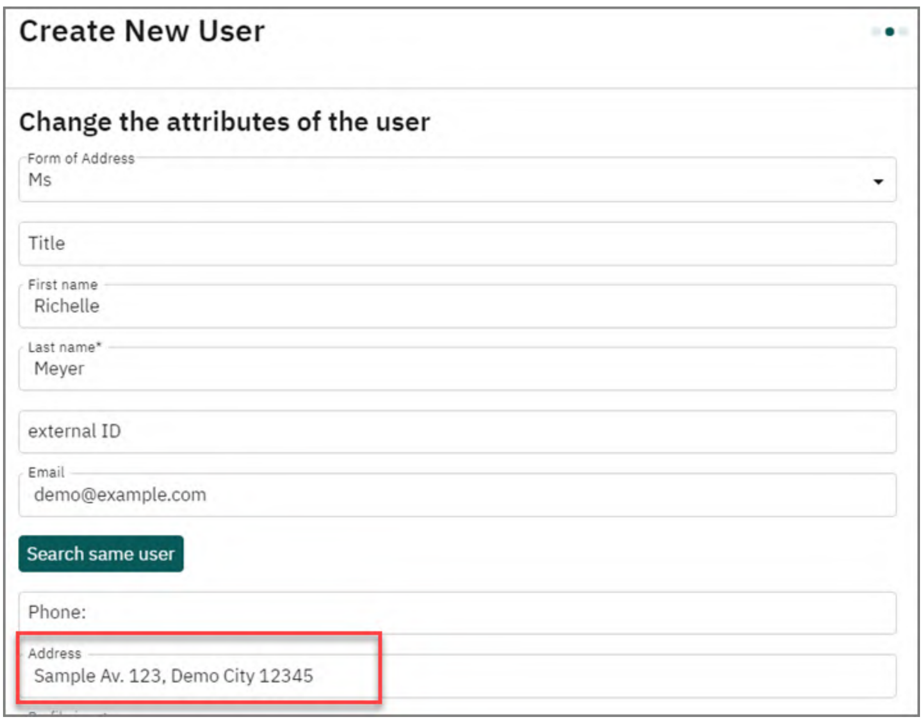


Figure 438: PDF Letter: Specification of the Recipient's Address

- Sender's address:

  The sender's address (in the figure shown at the letter's top right) is specified by you in the configuration of each corresponding PDF report ("System Settings/ Report Settings/Configuration"). You will find the options "Sender part 1" up to "Sender part 3". Here you can insert the university's name, your company, street and city (or whatever else you may require):

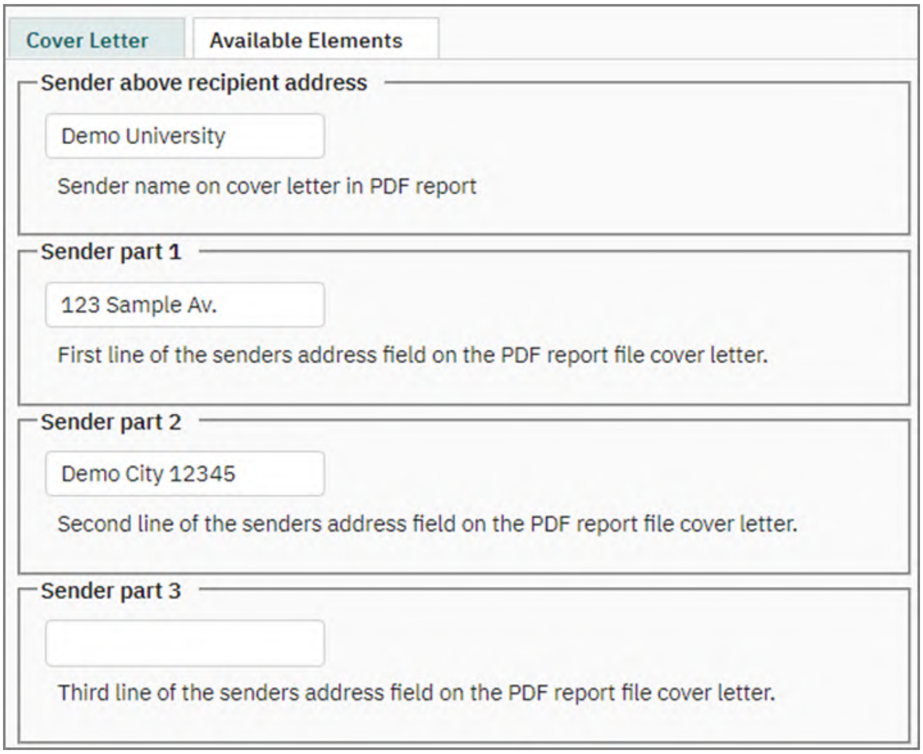


Figure 439: PDF Letter: Sender's Address on the Letter

The sender's details – to be found above the address field – are specified by you right below it ("Sender above recipient address").

The Text in the Letter

You can edit the text in the letter under the option "Text templates" (in the main menu "System Settings"). When changing to this page a window appears offering numerous text templates for you to choose from. Please select the text template "Results for instructors" in the section "Cover Letter":

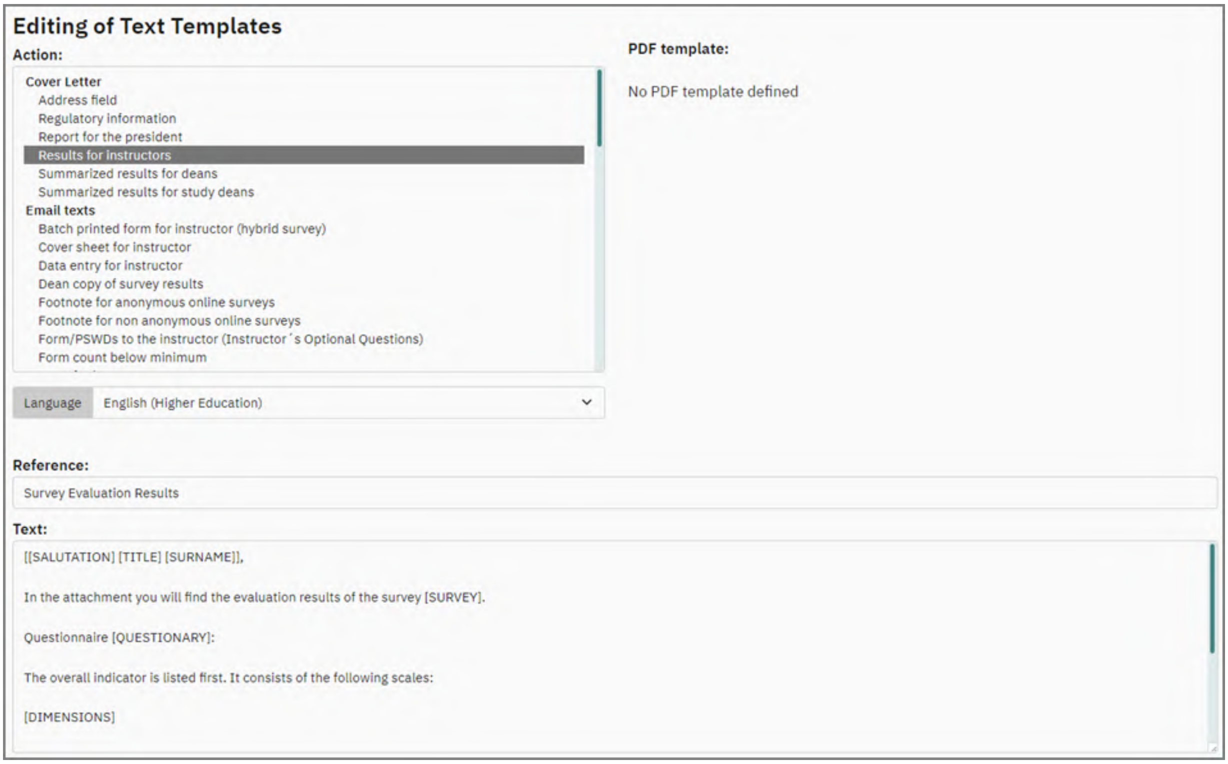


Figure 440: Text Template “Results for instructors“

When comparing the sample PDF letter with the text template in the figure above, you will notice that the texts are identical, apart from those areas written in capitals and set in angular brackets. This text template is automatically used as the text in the letter. The words that are written in capitals and marked through angular brackets serve as placeholders and will in the case of an actual letter be replaced by the respective values. [SALUTATION] is replaced by “Dear Ms”, “Dear Mr.” (or similar), “TITLE” is replaced by “Prof. Dr.”, “Dr.” (if existent), [SURNAME] e.g. by “Harwood”. A list of all available placeholders can be found in chapter D “If a participation certificate for participation in online surveys is activated in the questionnaire details in form of a PDF document, this text is used for the document.”.

The Layout of the Letter

You design the letter using a PDF template which you can upload in “Documents” (in the main menu “System Settings”):

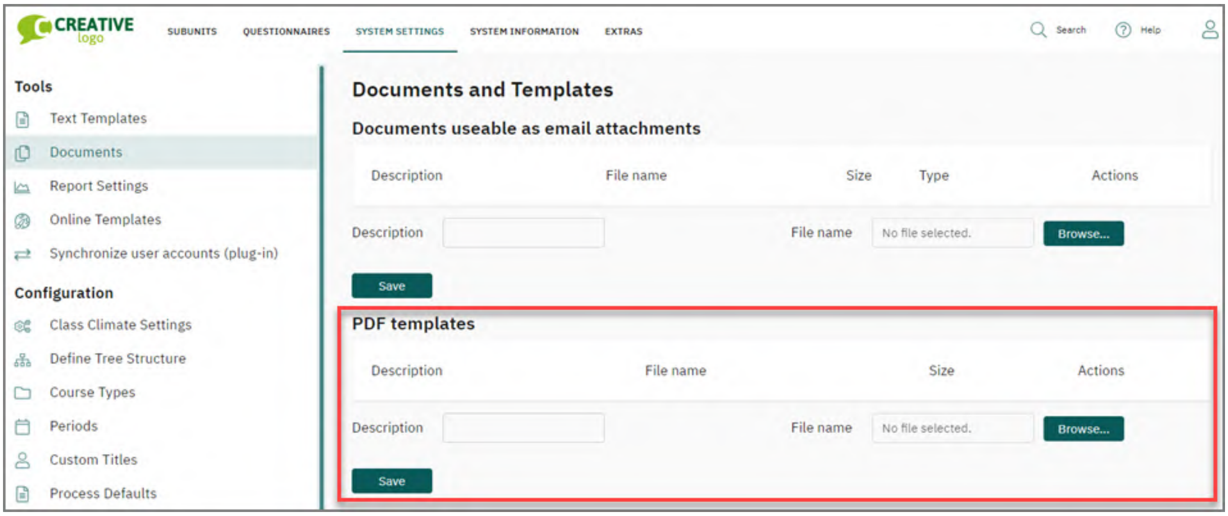


Figure 441: PDF Letter: Uploading Letter Template (for Designing the Layout)

You choose the template via the button [Browse]. In the field “Description” you can enter an appropriate name that will be displayed whilst you work in evasys with this letter.

These PDF templates have to adhere to particular design settings that you will find in chapter D 2.2.2. “PDF Templates”.

Here for instance, you can, deposit your company’s letter head as a PDF template. After doing this, please remember to link this template with the text of the letter. To do this you return to the field “Text templates” where the text of the letter is defined. There you add your PDF template by selecting the respective letter on the right-hand side and then clicking on [OK]:

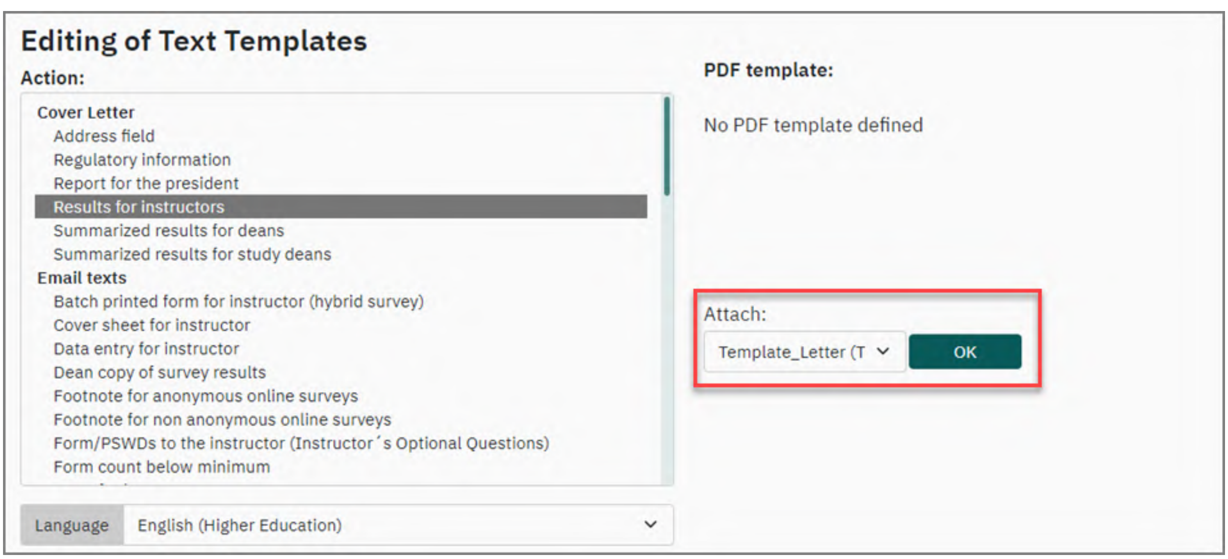


Figure 442: Cover Letter: Selecting the PDF Template in the Field “Text templates“

The selected PDF template is then assigned to the letter text:

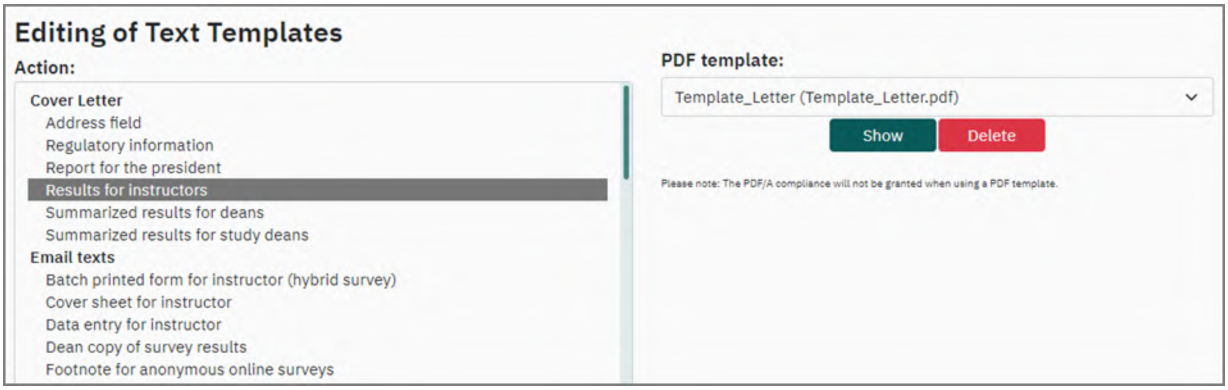
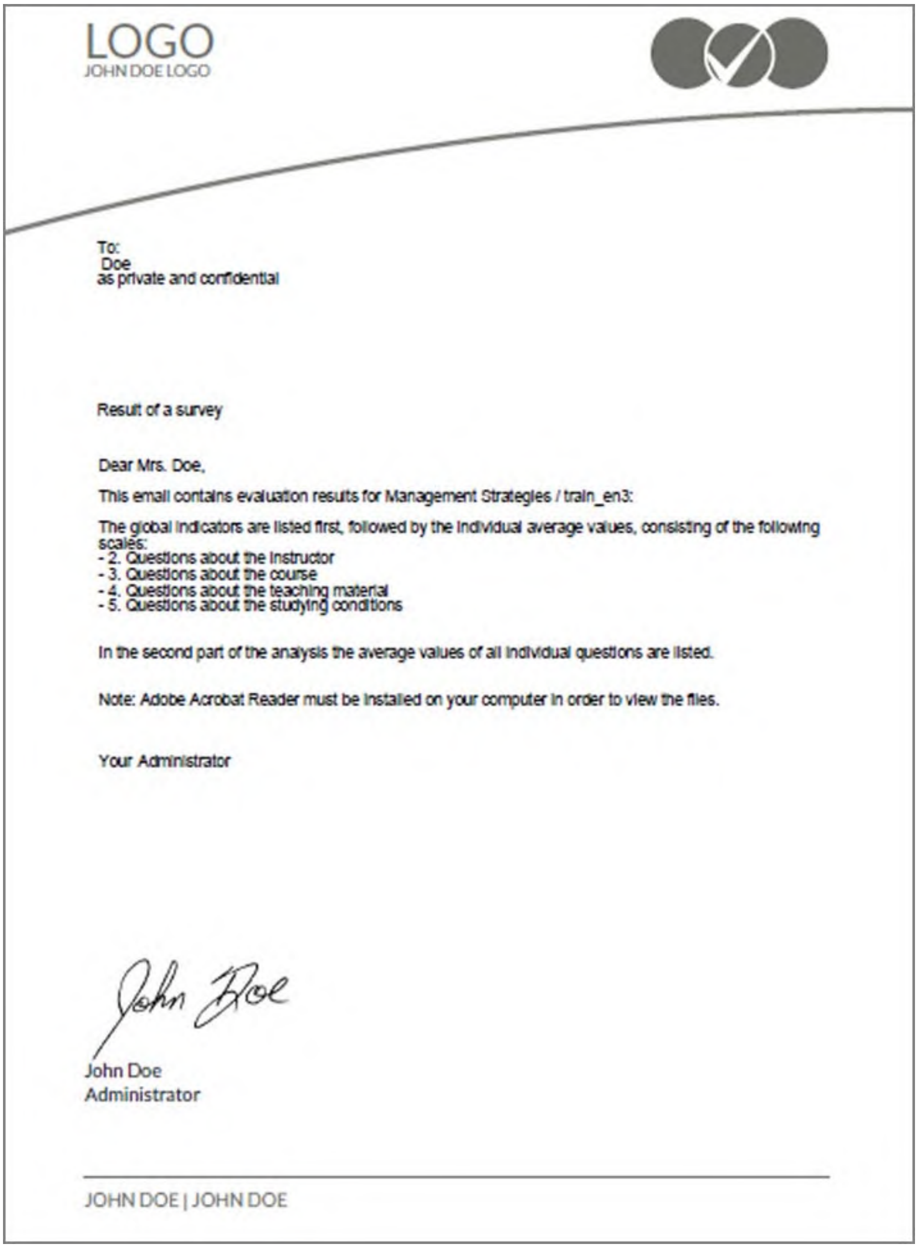


Figure 443: Cover Letter: A letter Linked with a Text Template

This results in the defined text elements (continuous text, address) being placed over your desired layout. Instead of the standard letter you get a letter which contains the corresponding elements – text and layout.

As an example, you can see here the PDF letter to Mr. Belmore with the evasys sample template as layout:



LOGO
JOHN DOE LOGO

To:
Doe
as private and confidential

Result of a survey

Dear Mrs. Doe,

This email contains evaluation results for Management Strategies / train_en3:

The global indicators are listed first, followed by the individual average values, consisting of the following scales:
- 2. Questions about the instructor
- 3. Questions about the course
- 4. Questions about the teaching material
- 5. Questions about the studying conditions

In the second part of the analysis the average values of all individual questions are listed.

Note: Adobe Acrobat Reader must be installed on your computer in order to view the files.

Your Administrator

John Doe
Administrator

JOHN DOE | JOHN DOE

Figure 444: PDF Letter: Sample with a new Layout

If you do not wish to use this layout system-wide but only for surveys that are conducted with a certain questionnaire, you can also upload documents for a particular questionnaire.

To do this, you go to the details of the relevant questionnaire (via the menu “System Settings”, on the left-hand side of the menu “Questionnaires”. In the list that appears, you select a questionnaire and navigate by clicking on the name of the details of the questionnaire).

In the area “Advanced Settings” you see a drop-down list with several options to choose from:

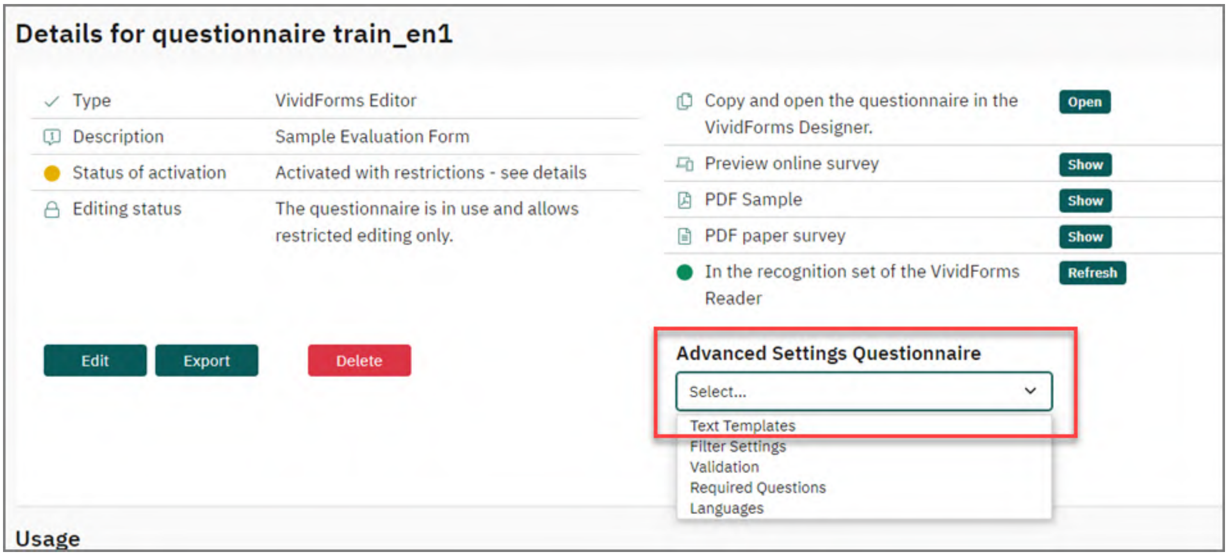


Figure 445: PDF Letter: Modify Text Templates for a Specific Questionnaire (Questionnaire Details)

When the top option “Text Templates” is marked and you click on [Edit] the window for the “Text Templates” whose screen resembles the one for global text templates will open:

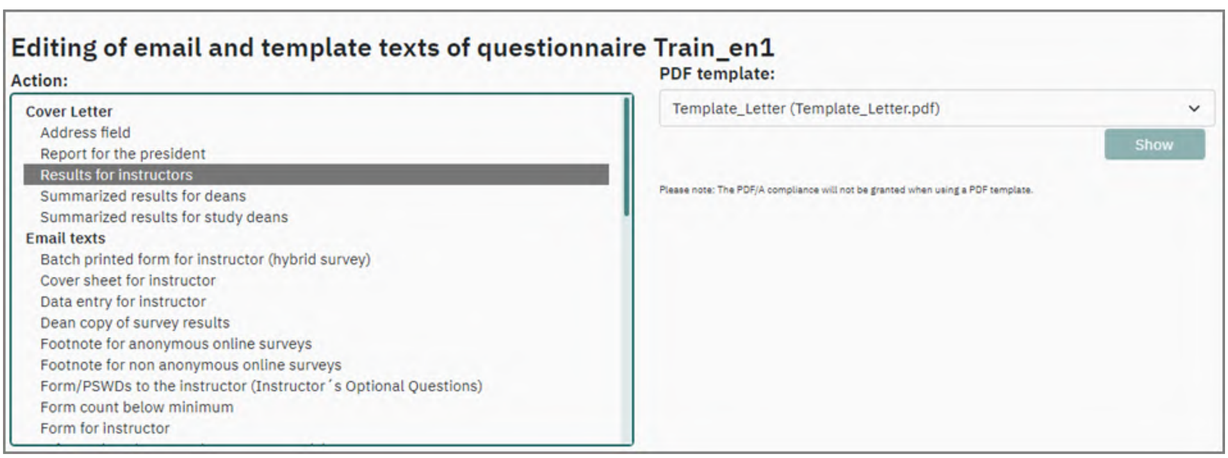


Figure 446: PDF Letter: Modifying Text Templates for a Specific Questionnaire (Template View)

However, all templates that you upload here and all texts that you change here are only used for the reports that are associated with this questionnaire's survey. This way you can design the letter according to your particular requirements.

If you do not need an accompanying letter, you can switch it off. For this purpose just deactivate the option “Generate Letter” in the configuration of the corresponding PDF report (in the menu “System Settings/Report Settings/Configuration”).

Display cumulative frequency

For single-choice and scaled questions, it is possible to cumulate the response frequencies of several options (for example scale of approval: show the overall percentage of the three positive options of a six-point scaled question). To do this, in the Data

Export Configuration of the questionnaire ("Details of the questionnaire/Advanced Settings/Data export configuration") the variable name has to be adapted in a way that for each option whose frequency has to be cumulated, the variable name of the small letter "o" and the position of the option is added as a number. If, for example, the last two options of a single-choice question with four options are cumulative, the variable name of the question must be added the string "o3o4".

Example:

In a patient survey, the percentage of respondents who would recommend the hospital shall be displayed. The question is a scaled question with four options.

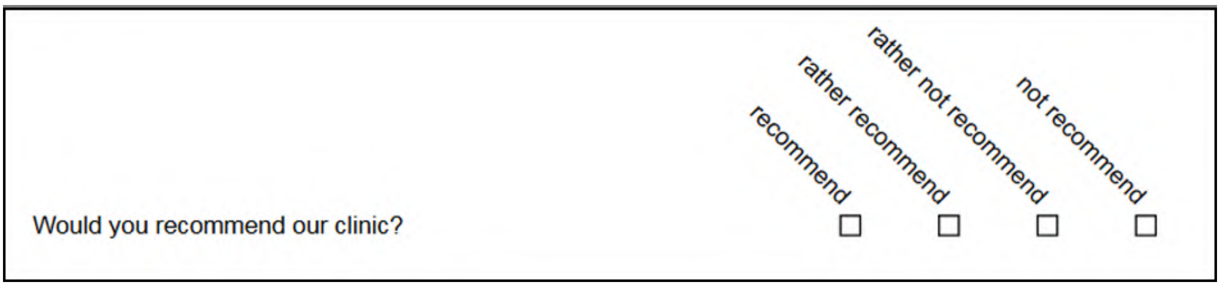


Figure 447: Question example of cumulative frequency

To cumulate both of the two positive answer options "recommend" and "rather recommend", you first have to open the Data export configuration:

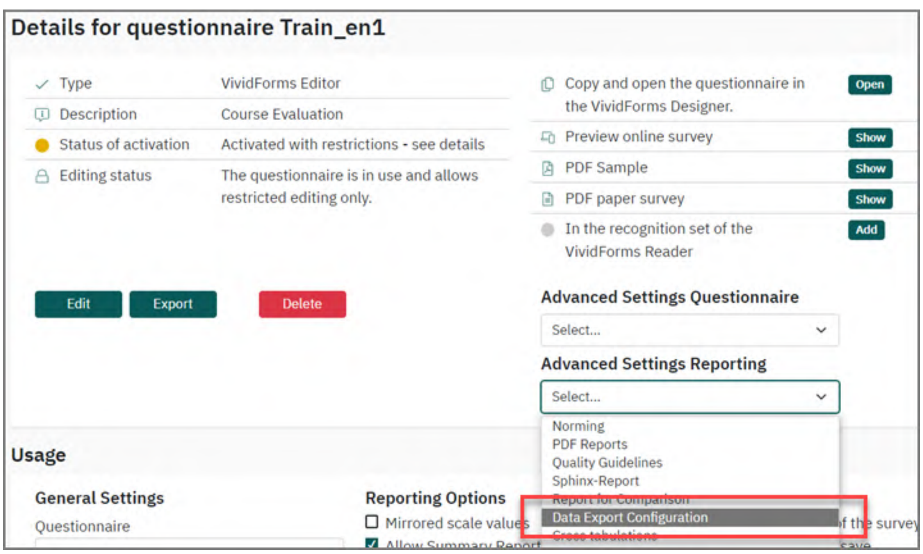


Figure 448: Open Data Export Configuration

Here you must change the variable name of the corresponding question. In this case, you add the characters "o1o2" (small "o" for "option") to the variable name, because you would like to cumulate the frequencies of the first two options. So the question is no longer named "V5_G" but "V5_Go1o2":

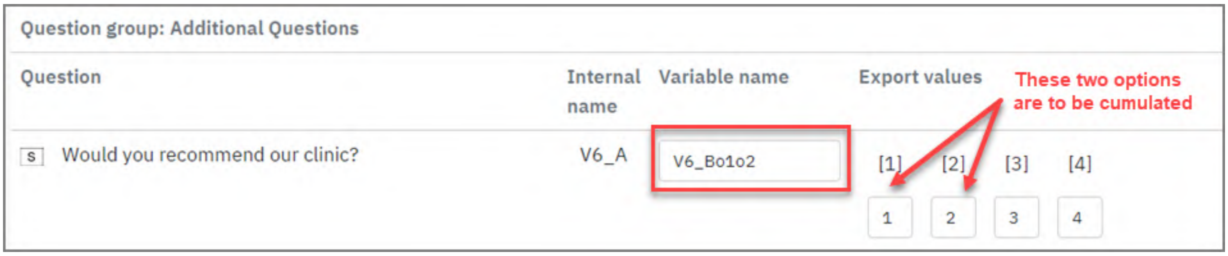


Figure 449: Change of the variable name

Do not forget to save your settings by clicking the button [Save].

When the switch "Numerical values: Display cumulative frequency" for the desired report in the PDF report settings is activated, the summarized frequency of the two answers will be displayed as a numerical value next to the histogram in the PDF report:

Figure 450: Display in the report

Profile Line

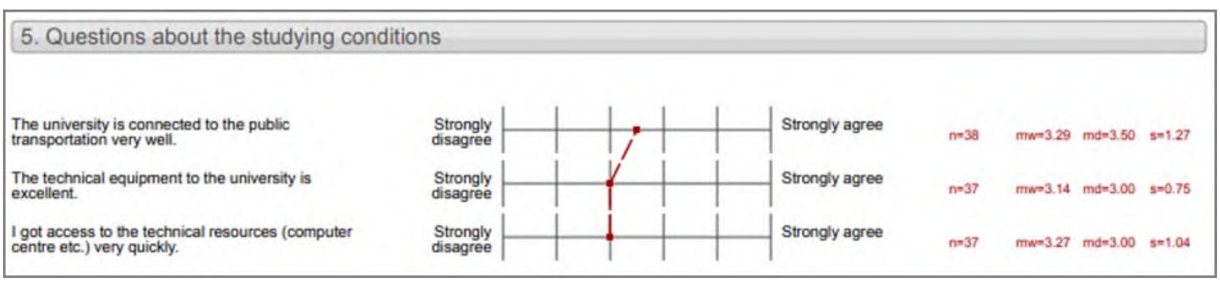


Figure 451: PDF Report: Profile Line

The profile line is a dashed line along the averages of scaled questions. The average will also be displayed as a numerical value.

The following function must be activated in order to create a profile line “System Settings/Report Administration/evasys Settings/Create Profile Line.” You can choose to display the median instead of the arithmetic mean under “Profile Line: Show Median.” You can set the numerical value display for mean, median, standard deviation, and response rate per question under “Profile Line: Show numeric values.” If this option has been deactivated, then only the response rate and the value shown in the profile line (mean or median) are displayed.

If desired, the profile line can be divided corresponding to question groups and thereby can be displayed in separate sections. To do this, activate the option “System Settings/Report Settings/Profile line: Display question groups”.

Dual Scale Profile Line (Quality and Importance)

With the dual scale, two scaled questions are linked to one another, whereby an extended evaluation of the two questions is made possible. In VividForms Editor, it is already specified when creating the question group in which form the included dual scales should be evaluated. If the dual scale “Quality and Importance” is selected, then the combined questions are evaluated in the form of a dual scale profile line. For further information on creating questions, please refer to the separately available VividForms Editor manual. In the case of VividForms Designer questionnaires, you can specify for each question group after publishing the questionnaire in the questionnaire details (“Advanced Settings/Edit texts (Report and Online survey”), the form in which the dual scale (in Designer “Scale A and Scale B”) should be evaluated. By default, the dual scale “Quality and Importance”, and thus the profile line display, is pre-selected.

The purpose of a dual scale combination of quality and importance is to differentiate important improvement areas from unimportant, thus being able to reach more targeted decisions after the survey.

The result of the quality question (a) is subtracted from the result of the importance question (b). In a 6-scale, the range then is between -5 and 5. Values 1-5 are considered critical if the positive pole (true/very important) in the questionnaire is on the left hand side. Values from -1 to -5 are considered critical if the positive pole (true/very important) in the questionnaire is on the right hand side. In the following example, first a scale question was added to the quality of the technical equipment and then linked to a second scale question on the importance of technical facilities:

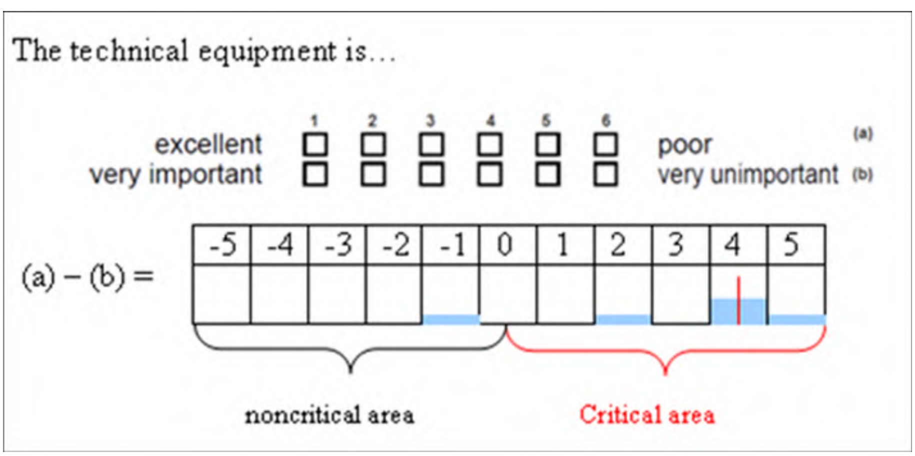


Figure 452: Calculation of Dual Scales

Displaying and display mode of the Dual Scale Profile Line has to be activated in the PDF Report Definitions (see chapter B 4.7.9. “PDF Report Definitions”). If you select “0” to disable the display of the double scale. Select “1” specifies that the critical values of the questions are on the left side of the scale; with the “2” are the critical values on the right side of the scale.

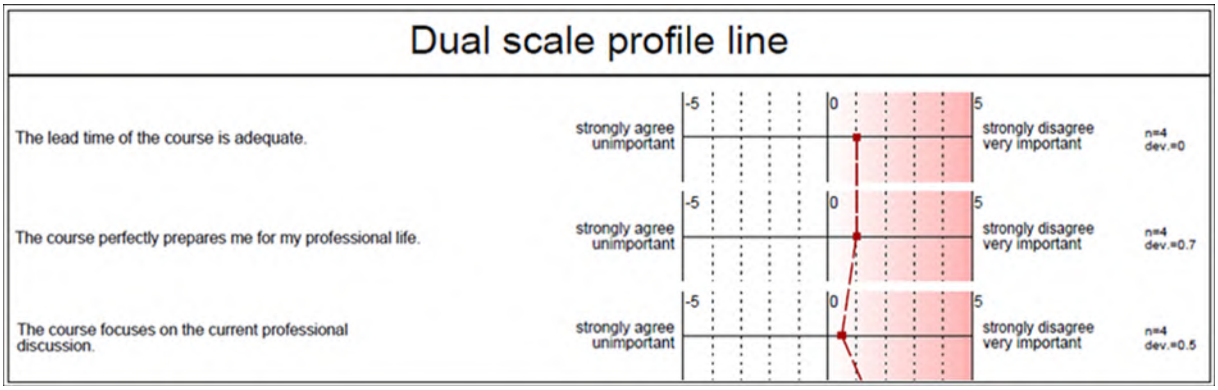


Figure 453: Dual Scale Profile Line in PDF Report

Further information on the calculation see chapter C 5.1. „Quality and Importance“.

Dual Scale Radar Chart (Target-performance comparison)

With the target-performance dual scale, the results of the combined questions are displayed in the PDF report as a radar chart. As described above for the dual scale profile line, in the case of VividForms Editor questionnaires, the dual scale type “Target-performance comparison” is chosen when creating a question group; in the case of VividForms Designer questionnaires, the individual group is assigned the type “Target-performance comparison” after publication in the questionnaire details.

This type of dual scale can be used, for example, to display deviations with regard to expectations on certain quality characteristics. Because the assessment is structured in a radar chart, at least three dual scaled questions have to be created (six-point scaled questions). The more questions contained in a group, the more comprehensive the radar chart.

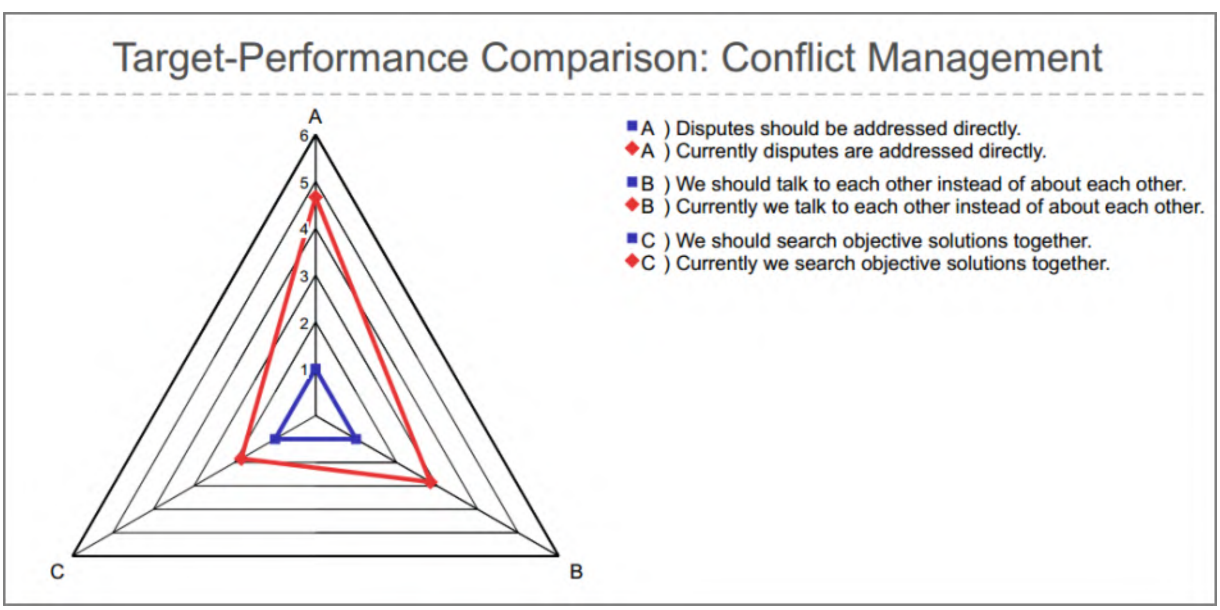


Figure 454: Analysis of target-performance comparisons as radar chart

Please note that the diagram contains the value of the highest answer option as maximum range. If, in a question group, you have scaled questions of different scale lengths (e.g. 4 or 6 scaled questions) or polarity, this has to be considered during interpretation. We recommend that you use a consistent scale. For further information please see chapter C 5.2. „Target-performance comparison".

Dual Scale Learning Outcome

With this type of dual scale, the results of the learning outcome evaluation are displayed in a special evaluation and graphic, according to Raupach et. al. Med Teach 2011:e446-ee453. As described above for the dual scale profile line, in the case of VividForms Editor questionnaires, the dual scale type "Learning Outcome" is chosen when creating a question group; in the case of VividForms Designer questionnaires, the individual group is assigned the type "Learning Outcome" after publication in the questionnaire details.

For more detailed information on learning outcome evaluation, refer to the detailed information at chapter B 3.20.3. "Outcome-based Evaluation". For further information on the calculation of learning outcome please see chapter C 5.3. „Learning Outcome".

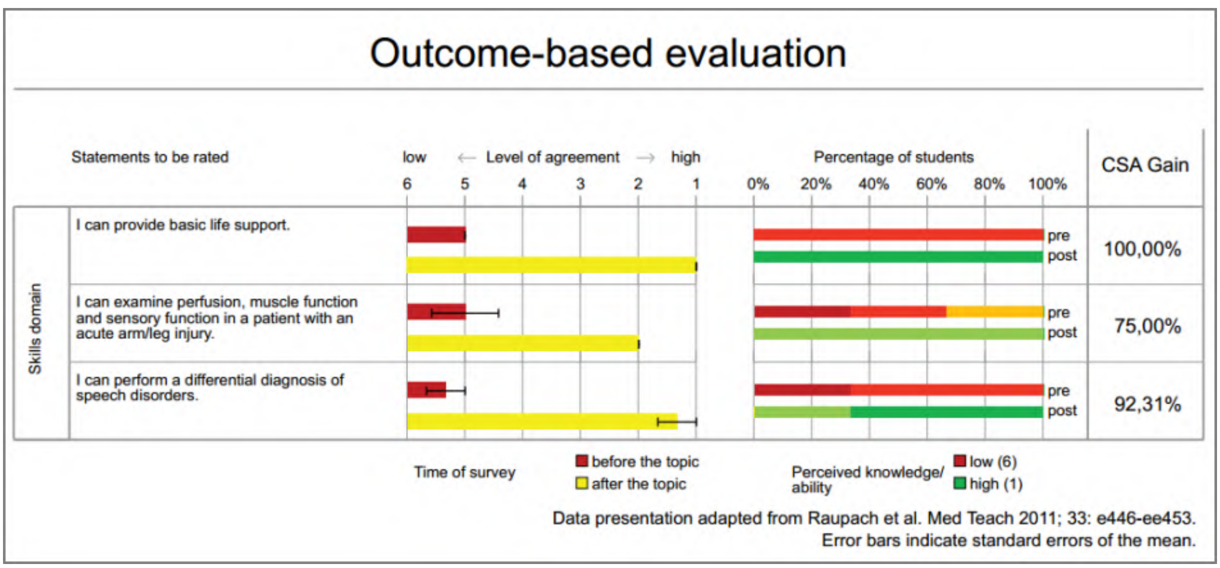


Figure 455: Analysis of the outcome-based evaluation

4.7.9. PDF Report Definitions

The evaluation reports in evasys can be influenced in two places.

The chapter before explained that the configuration of each PDF report can be edited under „System Settings/Report Settings". The second way is by restricting the content of the PDF report as well as defining the sub-reports and special report recipients. For a better interpretation of the single question analysis, indicators or quality guidelines, explanatory texts or images can also be added as well as the order of the questions in the report. All these settings are summarized in evasys under the name "PDF Report Definitions".

If you have a questionnaire built up out of modules you can use report definitions to automatically create PDF reports for each module. These partial reports can also then be sent automatically to one or more recipients by email.

PDF report definitions are always defined for each questionnaire and then are valid for every survey created with this questionnaire.

Define Report Definitions

Just choose the option “PDF Reports” in the drop-down list in the details of the corresponding questionnaire (area “Advanced Settings”). Subsequently click on [Edit].

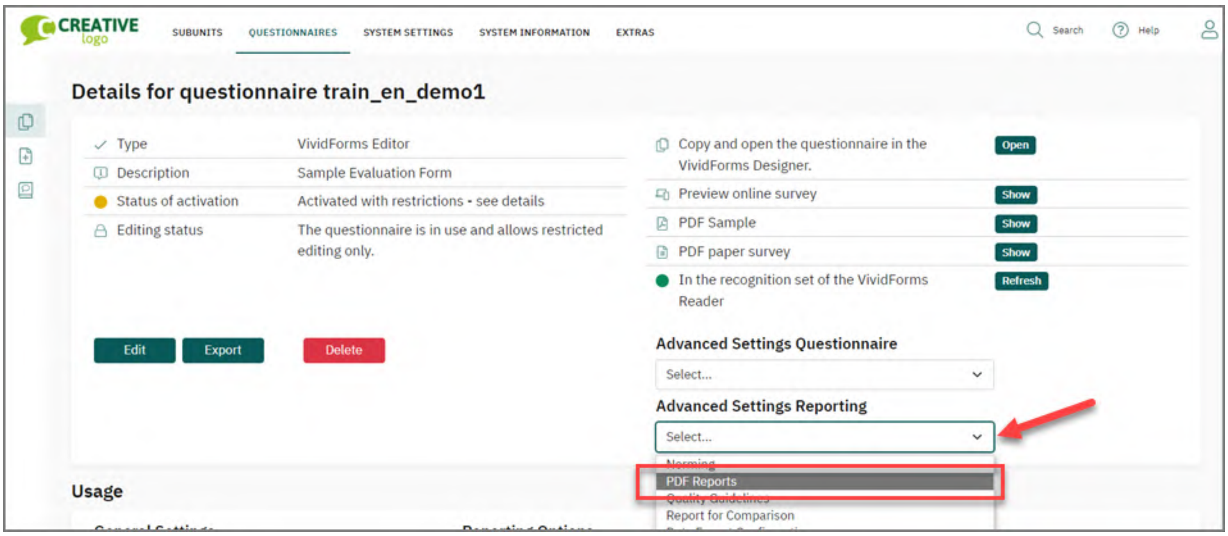


Figure 456: PDF Report in the Questionnaire Details

The following window opens automatically:

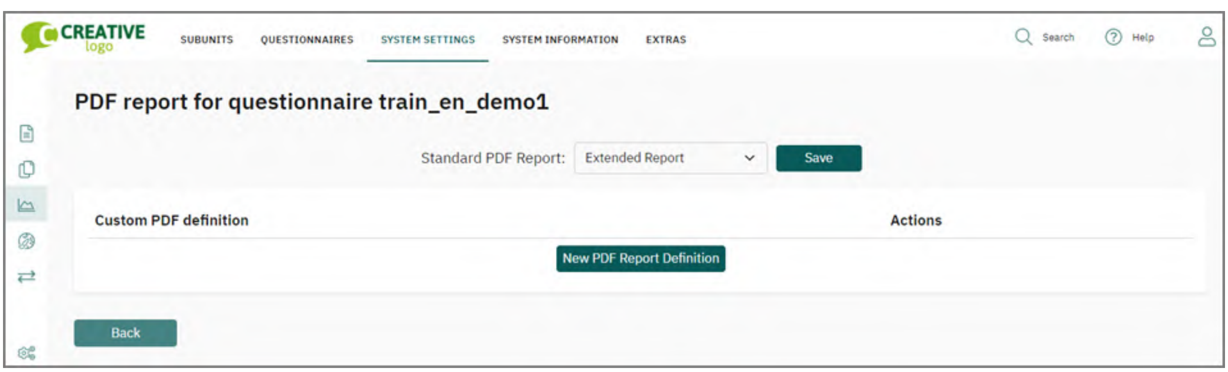


Figure 457: Report Settings for a Specific Questionnaire

In the area “Standard PDF Report” you can define the PDF report with which the corresponding questionnaire will be displayed by default. Select the corresponding PDF report in the drop-down list and save your changes by clicking on [Save]. Please note, that the “evasys PDF Report” is selected by default.

To create a new custom PDF definition click on [New PDF Report Definition]. If required you can create more than one report definition for one questionnaire.

In the window now open you have the following settings:

- name of the report
- selection of the basic report (The configuration settings are adopted from the basic report.)
- description of the report
- recipient list for automatic email delivery
- activate recalculation of indicators (only available if you have defined indicators for the corresponding questionnaire).

Note:
If a special report has been defined then this will always have priority over the default report when sending the results via the process defaults or the scheduled online surveys. In the survey list and the batch events the default report will always be sent. In the details of the survey the user can define which report has to be sent.

You can now enter further recipients in this report definition. Further recipients could include, for example, the dean of studies or a head of technical services, if a section of the questionnaire deals with the technical infrastructure of the university/company.

The recalculation of the indicators causes the average values of the indicators to be recalculated independently of the questions used.

A click on [Save] saves the settings.

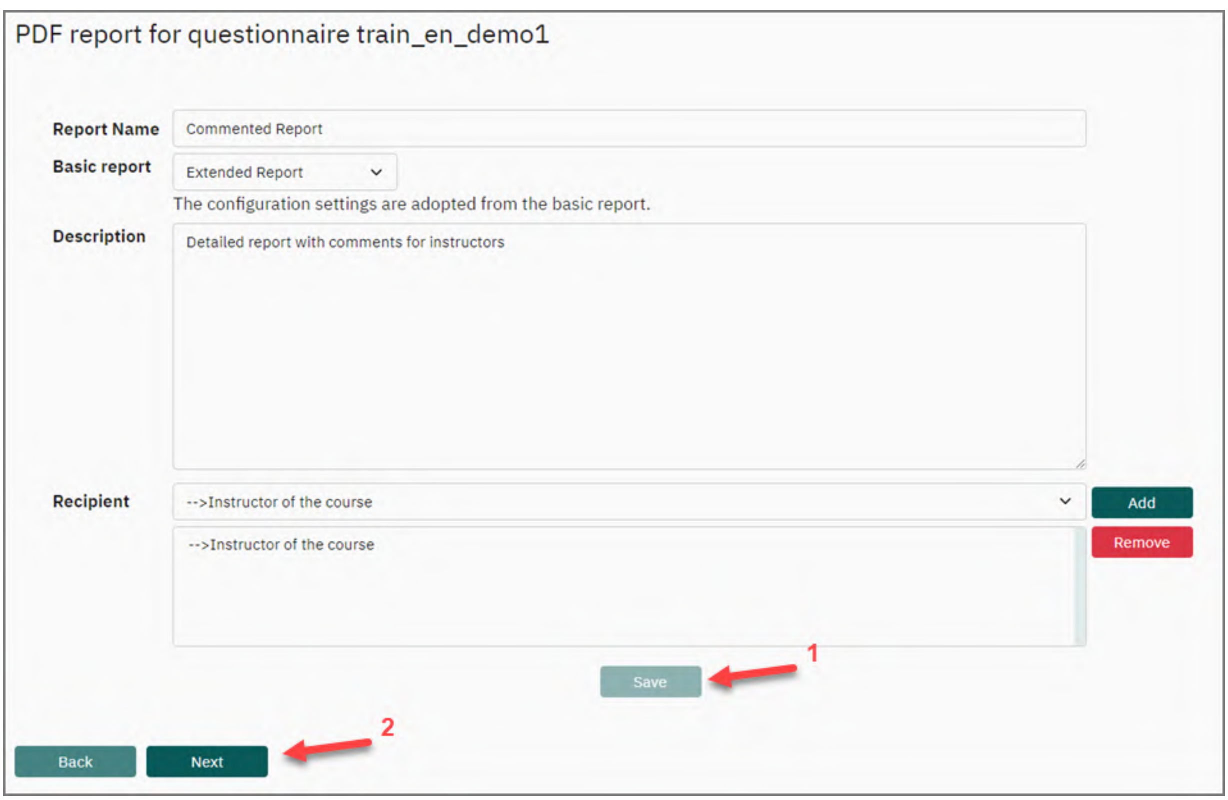


Figure 458: PDF Report Definitions - Basic Settings

The report editor for the selected questionnaire opens.

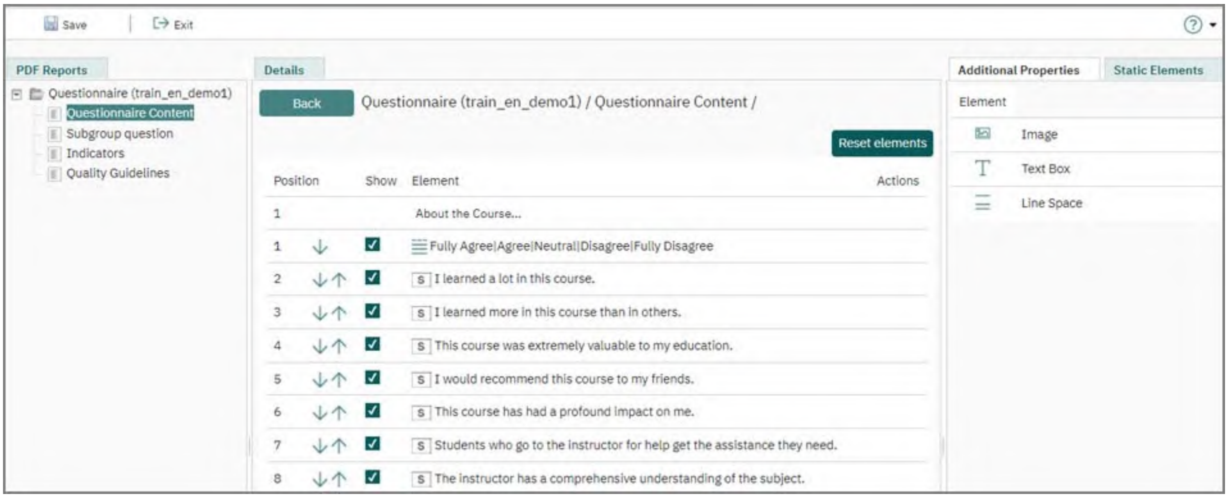


Figure 459: Report Editor for the Questionnaire

The header contains two buttons for "Save" and "Exit". Please note that the report editor does not automatically save your settings. To do so, please click on the "Save" button. If you click on "Exit" without having saved your changes, you will be prompted to do so.

The side menu on the left shows four main functional sections:

- Questionnaire Content
- Subgroup Question
- Indicators
- Quality Guidelines

Questionnaire Content

In the section “Questionnaire Content“, the content of the questionnaire is displayed in the center of the window.

The sequence of the individual questions can be changed using the blue position arrows or drag&drop.The checkboxes in the "Show" column serve to exclude individual questions from the report. In this way, you can create shorter reports for specific recipient groups which are restricted to the relevant parts of the questionnaire.

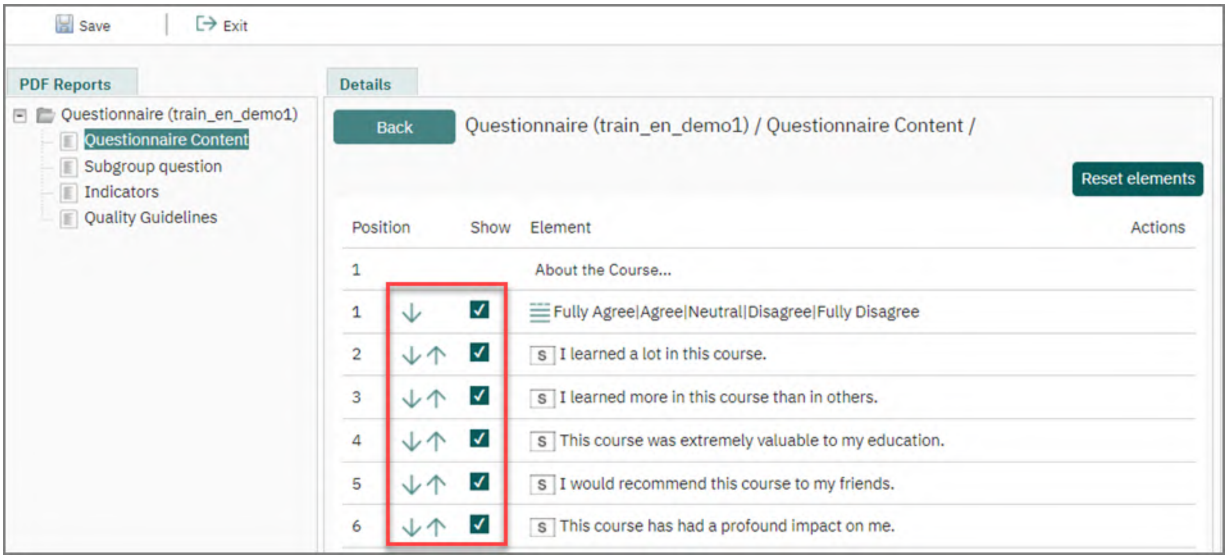


Figure 460: Define Sequence and Display of Questions

The properties of the individual questionnaire elements can be edited in the right-hand area. In addition, various "static elements" can be added to the report.

Click on a question. On the right side, the associated properties will open, if available. In the case of scaled questions, for example, the diagram type can be changed. In the case of single choice questions, you can specify whether a mean value is to be calculated.

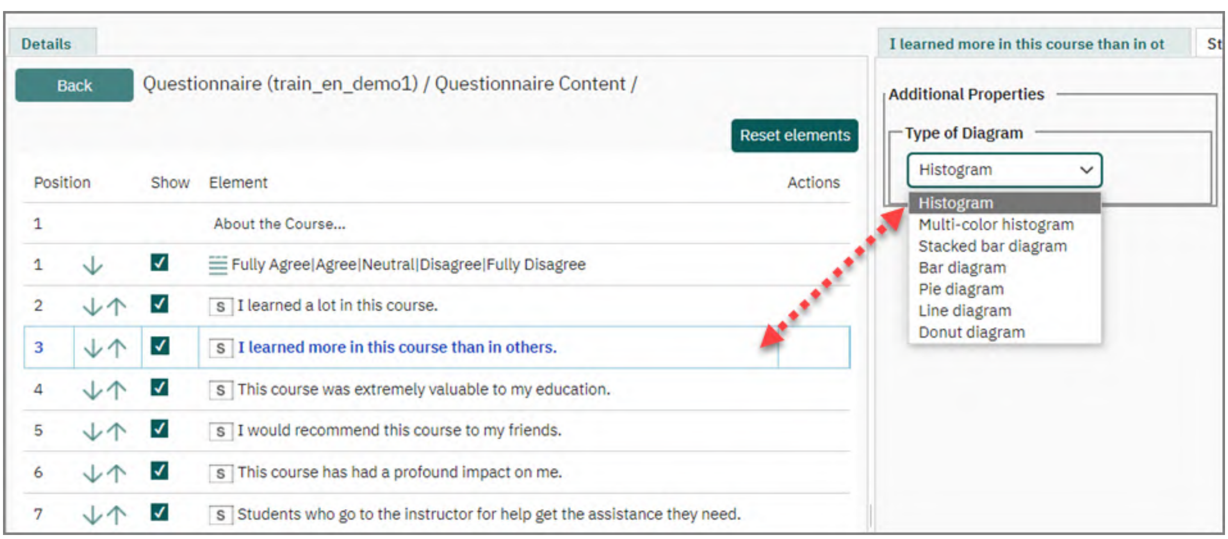


Figure 461: Edit Attributes of Questions

If you click on the "Static elements" tab on the right-hand side, you will be offered three types of static elements to choose from: Image, text box and line space. All three elements can be dragged and dropped to the desired position in the questionnaire.

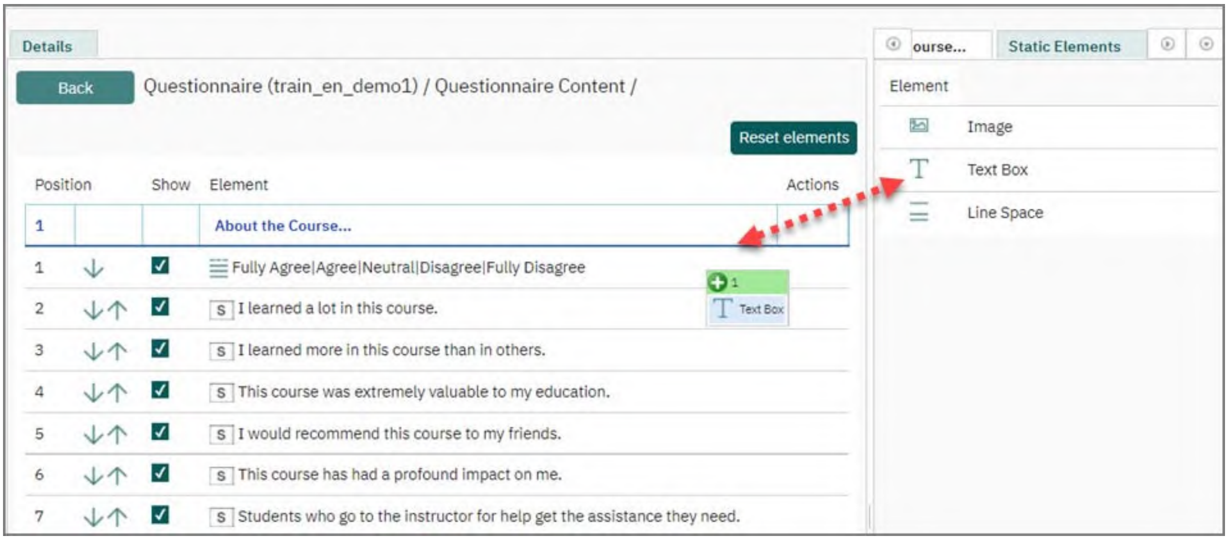


Figure 462: Add Static Elements

In the case of **text boxes**, a text input field opens on the right-hand side. The desired text can be entered here. In this way, explanatory texts can be added to the questionnaire, e.g. for a question group or for individual questions.

Note:
The text box always describes the previous element. This is particularly important as the dividing line between the questions is always displayed after the question and the text box.

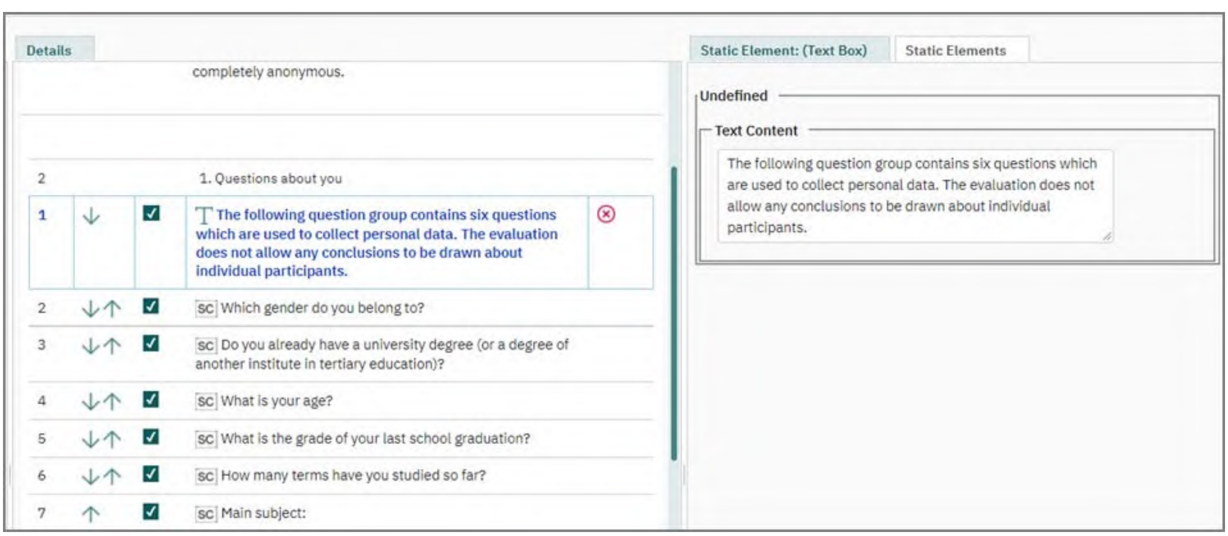


Figure 463: Edit Text Box

In the case of **images**, the image settings open on the right-hand side. You can upload and select an image using the "Upload picture" function. The size (as percentage of the page width) and the alignment of the image can be defined with the help of the two other settings. If you move the mouse over the image icon in the questionnaire view, a preview is also displayed. This way you can check whether the correct image was uploaded.

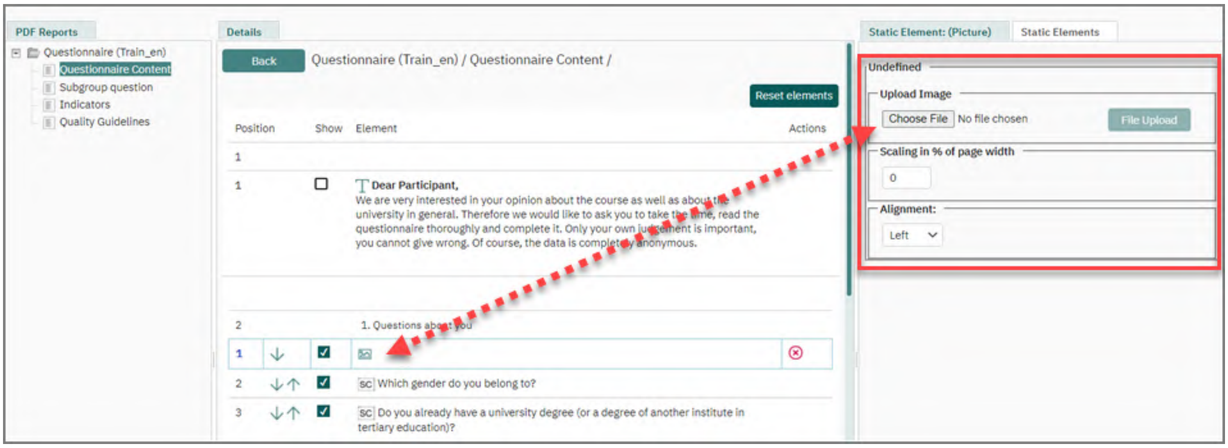


Figure 464: Edit Image

The line space is simply dragged to the desired position. No further settings are available here. All static elements can also be dragged and dropped or moved to the desired position using the blue arrows.

Here is an example of a report that has been supplemented with a static text to introduce a question group:

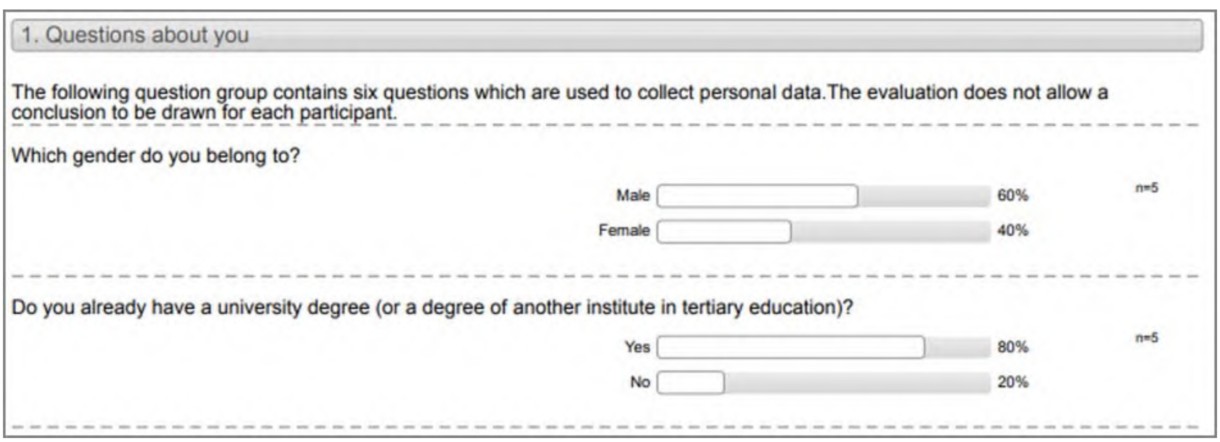


Figure 465: Example of Static Text in the PDF Report

Subgroup Question

In the section “subgroup questions” you can define a question for which automatic subgroups are built for each option in the report. The question has to be a single choice, multiple choice or matrix question. For each response option the answers are filtered and the result will be displayed as a separate report. This is of course done only for options that have been check marked or that exceed the minimum number of returns.

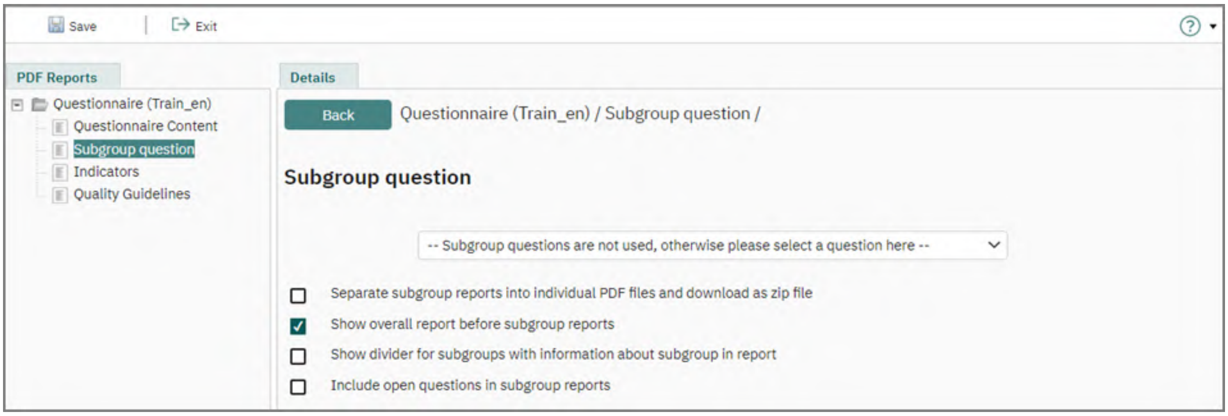


Figure 466: Subgroup Question

Example:

Subgroups allow you to take advantage of, for example, automatic filters according to the program of study, provided that there is a corresponding single choice question on the questionnaire which has been check marked by the participants. evasysautomatically generates areport for each subgroup, which can either be retrieved in a single PDF file or as individual PDF files in a ZIP archive.

The following settings are available:

- Separate subgroup reports into individual PDF files and download as zip file

If this option is activated, a ZIP archive with individual PDF files per subgroup is created when the PDF report definition is retrieved or sent, rather than generating a complete PDF containing all subgroup reports one after the other.

- Show overall report before subgroup reports

If the PDF report definition is created in one PDF, the individual sub-reports are preceded by the overall report for the survey. If the reports are retrieved as individual PDF files, the ZIP archive also contains the complete report.

- Show divider for subgroups with information about subgroup in report

With this option you activate the use of a separator between the subgroups. The individual reports in the ZIP archive also show the separator page as the first page as a cover page.The following information is shown on the separator:

- The question to be filtered
- The option the subgroup was constructed for
- The number of returns for this subgroup

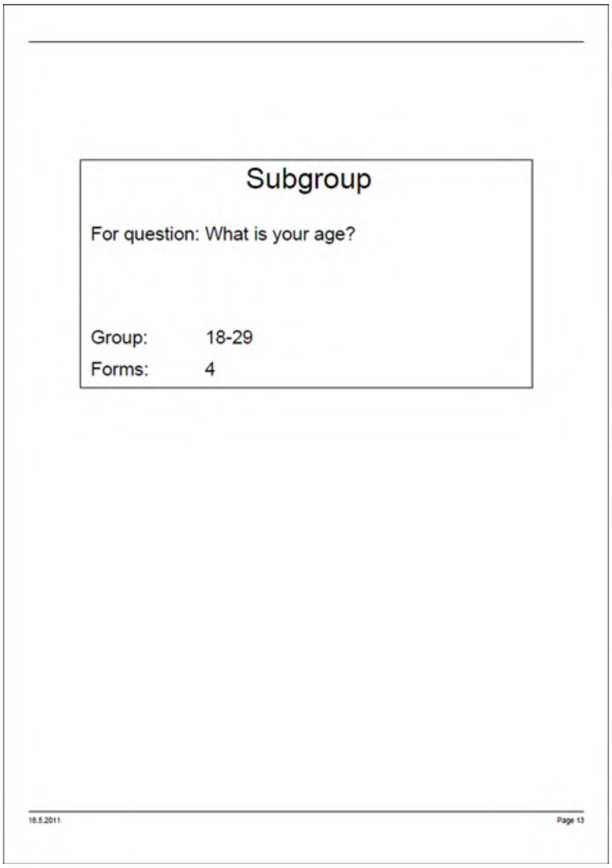


Figure 467: PDF Report Definitions: Divider for Subgroups

- Include open questions in subgroup reports

With this option you can define whether open questions will be displayed or hidden in the subgroups.

Indicators

In the "Indicators" section, you have the option of adding further elements such as explanatory texts or images to the indicator overview in the PDF report. To do this, drag and drop the desired element to the appropriate position.

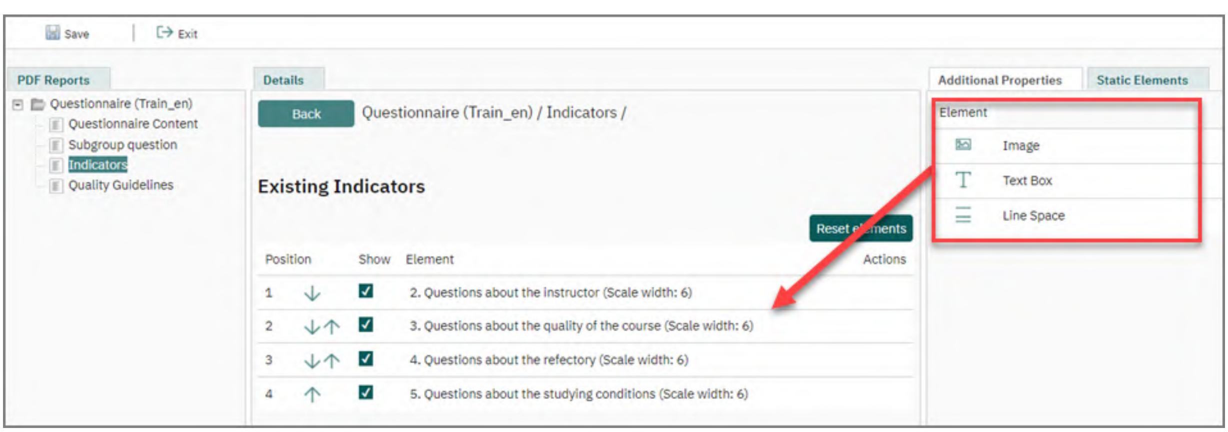


Figure 468: Comment Indicators

This function is particularly useful if you want to add your own aid to interpretation for the indicator diagrams. Please note that this function is only available if you have activated the calculation of indicators for the individual question groups when creating the questionnaire, or if you have defined free indicators in the advanced settings of the questionnaire. For further information on how to use indicators, please see chapter B 5.1. „Indicators“.

In the report, an overview of indicators with additional explanatory texts could look as follows:

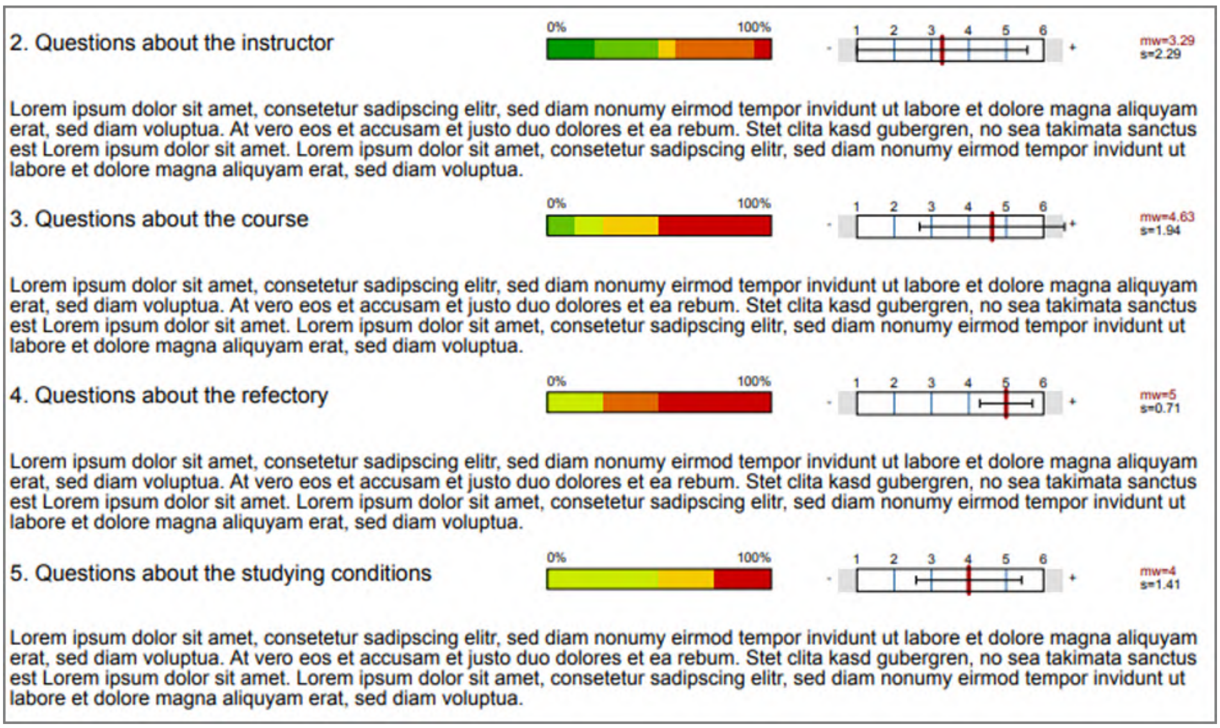


Figure 469: Example - Indicators with Static Text

Quality Guidelines

In the section “Quality Guidelines“, you can add further elements such as explanatory texts or images to the overview of the quality guidelines. To do this, drag and drop the desired element to the appropriate position.

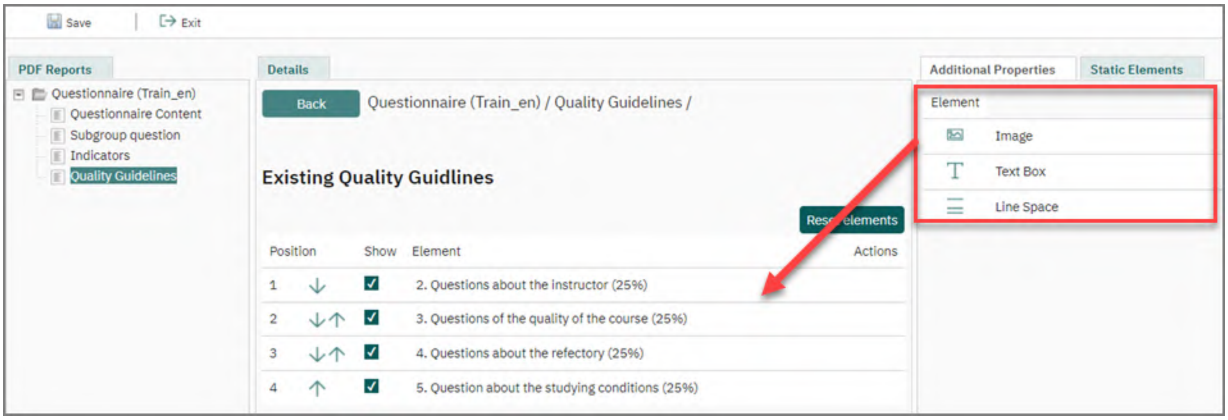
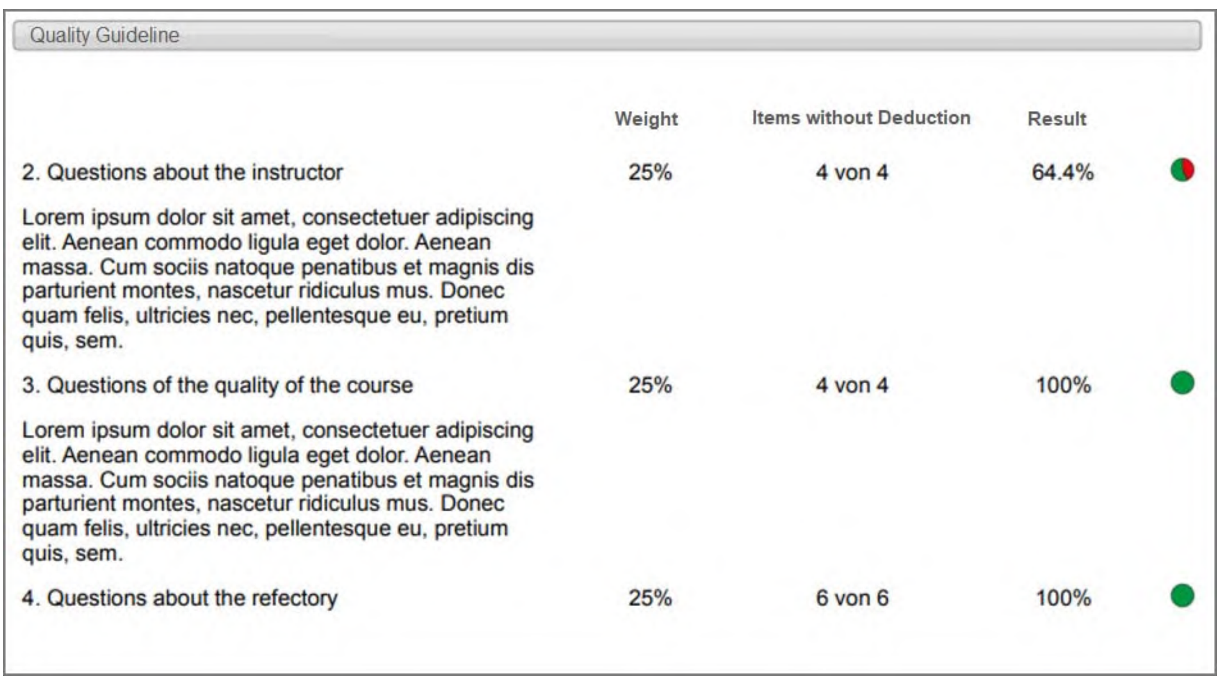


Figure 470: Comment Quality Guidelines

This function is particularly useful if you want to add information or comments etc. as an additional interpretation aid for the quality guidelines. Please note that this function is only available if you have already defined quality guidelines for the questionnaire. For further information on quality guidelines see chapter B „The window with the details of the created percentile rank norm appears.“.


Quality Guideline

	Weight	Items without Deduction	Result
2. Questions about the instructor	25%	4 von 4	64.4%
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem.			
3. Questions of the quality of the course	25%	4 von 4	100%
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem.			
4. Questions about the refectory	25%	6 von 6	100%

Figure 471: Example - Quality Guidelines with Static Texts

4.7.10. Upload PDF Report Plug-ins

PDF Report Plug-ins are either complete, individualized variants of the PDF Report, or individual report components that can replace certain parts of the evasys standard report, such as individual diagram types, scale labels or calculations. In the configuration of a PDF report plug-in, these appear as "sub-elements" in the PDF report settings. In order to integrate a PDF report plug-in into the evasys system, you click in the main menu “System Settings” on “Report Settings”. You can find the import interface for PDF report plug-ins below the list of available reports.

Via [Browse] you can choose the PDF report plug-in file. Then enter a description text and click on [Save].In this way several PDF report plug-ins can be integrated into the evasys system.

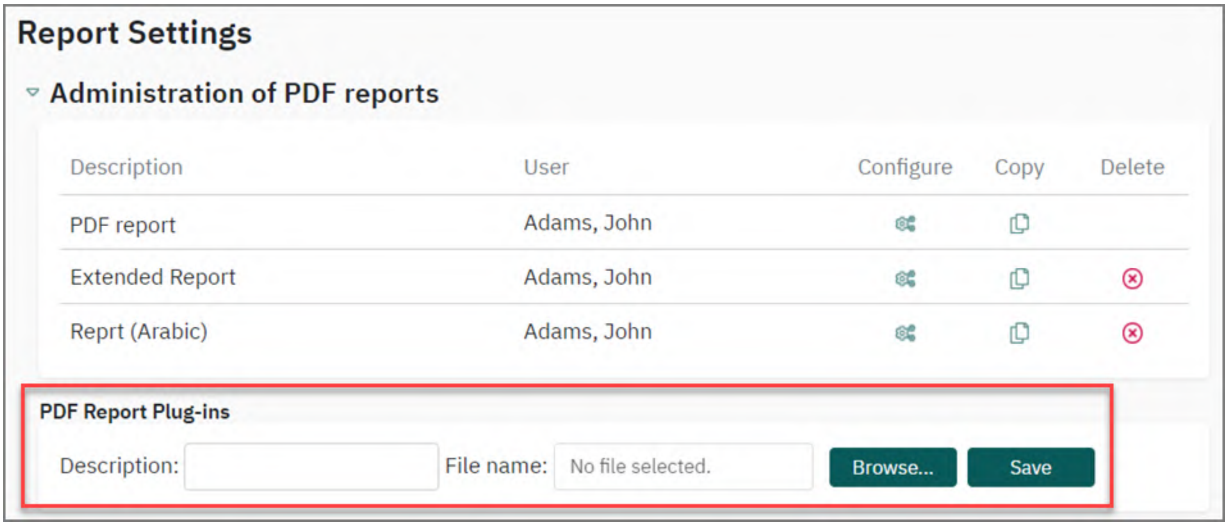


Figure 472: Upload PDF Report Plug-in

After uploading, the plug-in appears in the list and can be further configured if necessary. If it is a plug-in that adds alternative elements to your report, these are not only available in the currently uploaded plug-in, but are also offered for selection in the "Available Elements" section of other existing plug-ins. They can easily be added by drag&drop.

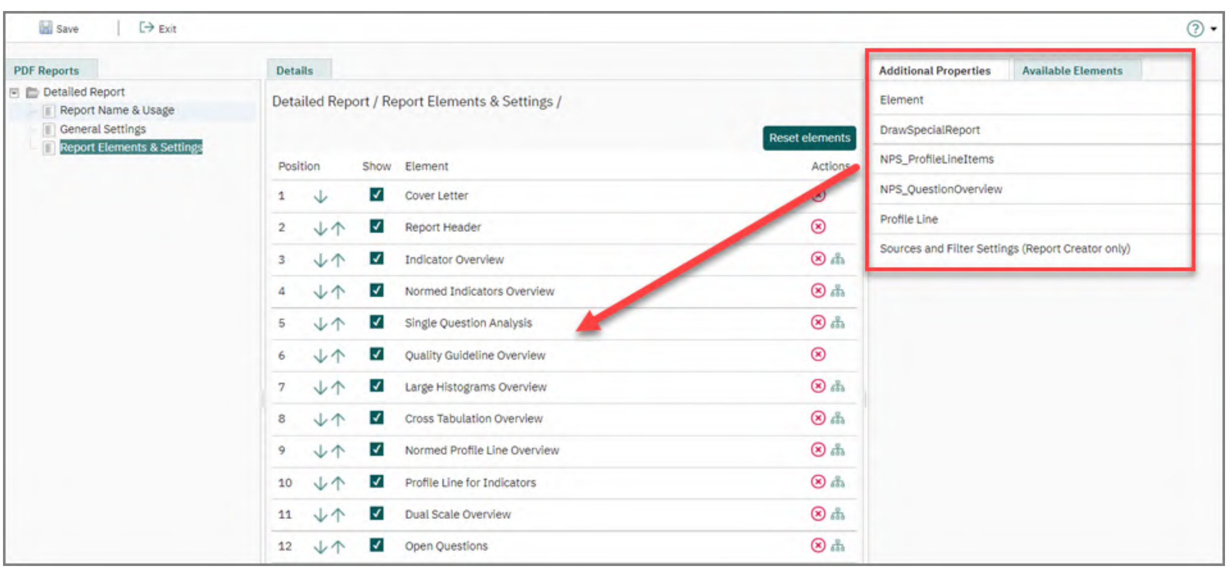


Figure 473: PDF Report Plug-in: Dialog for Editing

The plug-in can be selected for surveys which have been conducted with a questionnaire for which the plug-in is available. If you go back to the main menu “Subunits” and access surveys, a drop down-menu appears in the column “Report” of the survey overview. Through these you can access the available PDF report types and have the respective survey evaluated through the chosen report type.

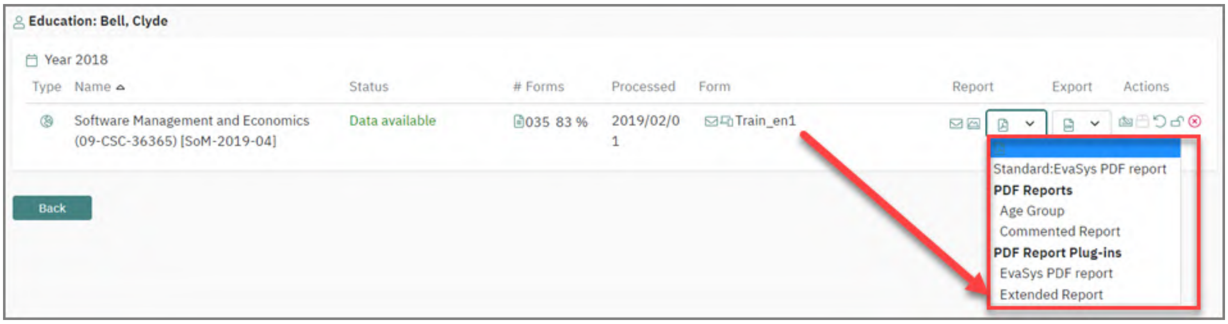


Figure 474: PDF Report Plug-in: Selecting the Adapted Report from the List of Surveys

4.7.11. Administration of Custom PDF Report Elements

Below the “PDF Report Plug-ins“ section there is an area where user-defined report elements can be uploaded to the system. These elements are report parts generated by additional programming, which can extend the standard report. Thus, existing report components can be replaced by individual, proprietary ones (e.g. the bar chart for scale questions can be replaced by a different representation) or new report components including calculations can be added.

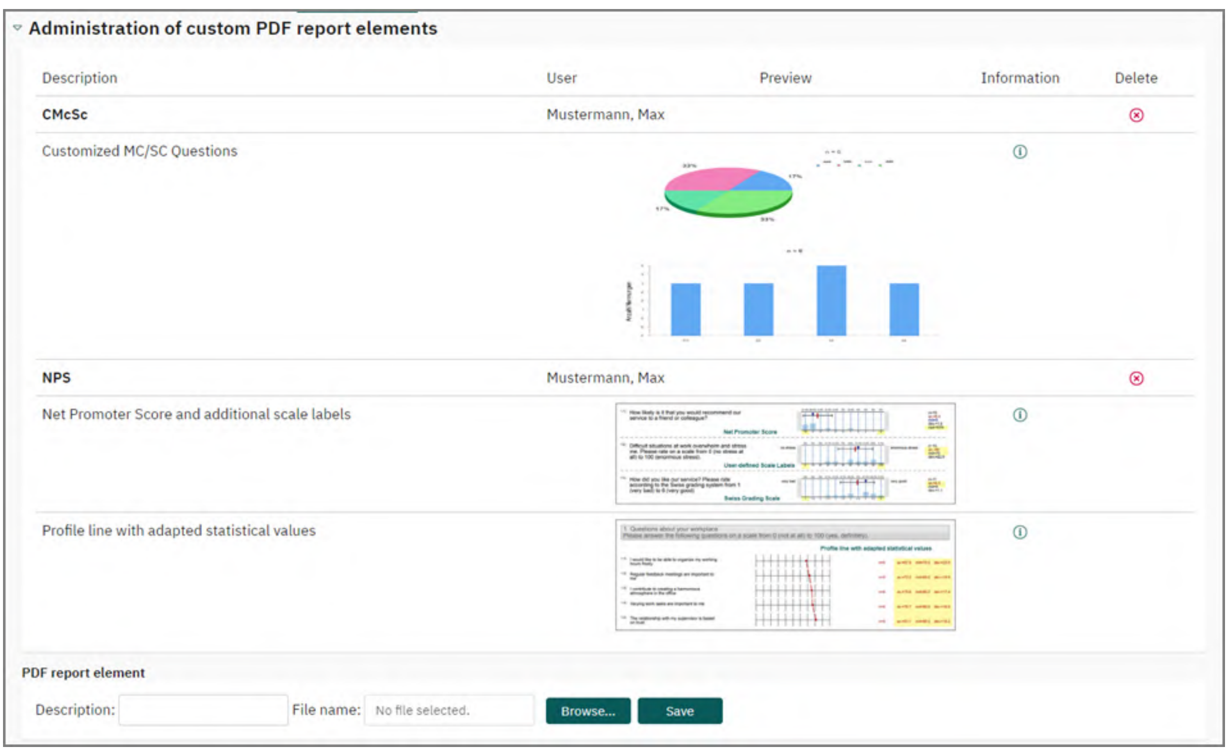


Figure 475: Custom report elements

Using the corresponding import function, elements or even entire sets of elements can be selected and uploaded.

4.7.12. Download and Sending of Reports

Manual Download of Evaluation Reports

When the reports are not to be sent to the instructors by email (“evasys Settings/Email Functions & Accounts/Attach PDF Report”) you can configure evasys so that instructors can login to the system and then manually download their PDF reports from the Central Evaluation.

- Passive instructors

  Passive instructors automatically see their surveys from the Central Evaluation. In order to do this simply activate access in “System Settings/evasys Settings/Central Evaluation/Passive Instructor: Access to Download Reports”.

  After authentification of the instructor s/he can select the survey period and all the surveys from this period are displayed with type, name, questionnaire, creation date, and number of returns.

  For each survey the instructor can now download the PDF report, if the questionnaire is multilingual then in a number of languages.

  The passive instructor can change his access data by clicking on the menu point “My profile”.

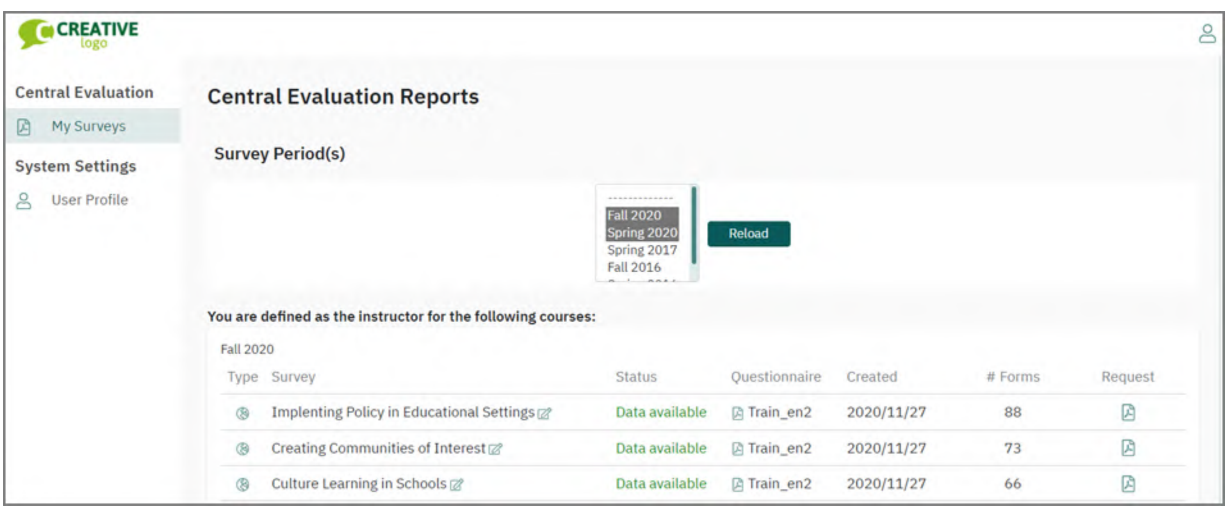


Figure 476: Downloading Reports by Passive Instructors

- Active instructors

  Active instructors have in their menu view a link to the reports of the Central Evaluation. To set this up simply activate the link in “System Settings/evasys Settings/Central Evaluation/Active Instructor: Download Reports from the Central Evaluation”.

  After authentification of the instructor, s/he can click on the link “Central Evaluation Report” and then receive the same view as the passive instructor. After selecting the period s/he can download the reports from the survey.

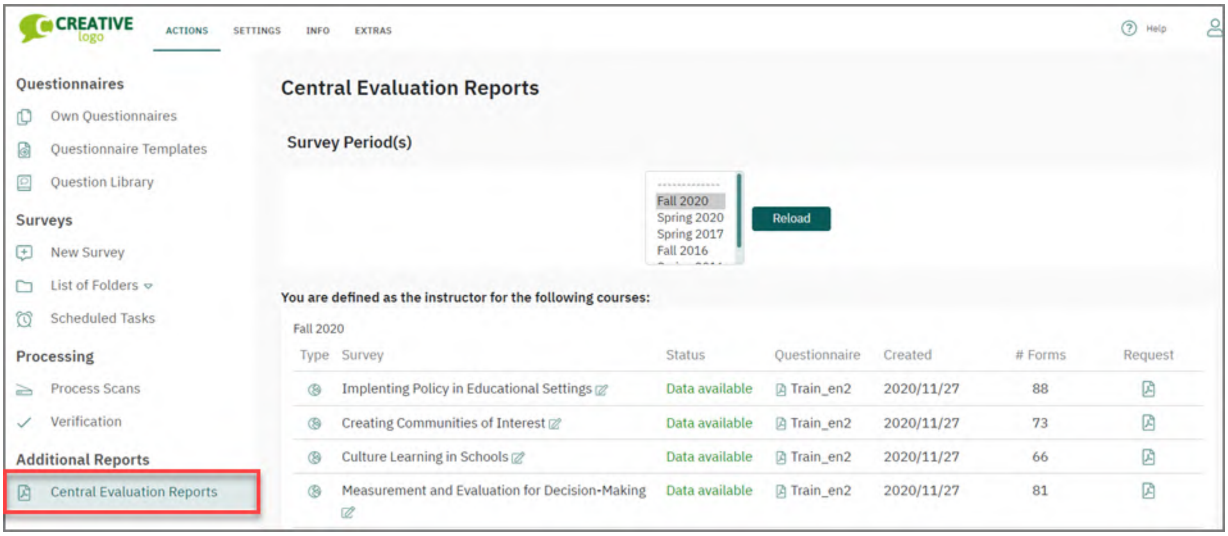


Figure 477: Download of Reports by Active Instructors

In order for the instructor to receive a message that s/he can download new reports, the automatic dispatch of emails should be activated after scanning.

At the same time the dispatch of the PDF reports or CSV data must be deactivated at “System Settings/evasys Settings/Email Functions & Accounts”. The email text “E-MAIL: Report for Survey” can be modified and, for example, describe how the instructor should login to the system.

The settings for email delivery do not only affect the automatic email dispatch but also the manual delivery of reports by the administrator using the survey view.

Mass Production and Sending of Reports

You can use the batch events for the mass production and sending of reports. For further information please consult the chapter B 3.21. “Batch Events”.

Types of report dispatch

The following table gives an overview on different possibilities of report dispatch in evasys together with notes on types of reports and report recipients.

Type of Dispatch	Notes
Process Defaults (only paper based surveys)	The PDF report definitions are sent to the defined recipient(s). The recipients are defined when creating or editing a PDF report definition. If no PDF report definition exists, the defined standard report will be sent instead. The standard report can be defined in the details of a questionnaire.
Scheduled Online Survey	The PDF report definitions are sent to the defined recipient(s). The recipients are defined when creating or editing a PDF report definition. If no PDF report definition exists, the defined standard report will be sent instead. The standard report can be defined in the details of a questionnaire.
Survey List (Envelope Icon)	The defined standard PDF report is sent to the defined recipient(s).The standard report can be specified in the details of the questionnaire. The report recipients are the instructor/ trainer as well as possibly selected “Further Report Recipients” (Secondary Instructors), if necessary.
Batch Events	The defined standard PDF report is sent to the defined recipient(s).If there is a PDF report definition available for the questionnaire used, you can select the report definition instead of the standard PDF report via a drop down list. A different standard PDF report can be defined in the details of a questionnaire.The report recipients are the instructor/ trainer as well as selected “Further Report Recipients” (Secondary Instructors), if necessary.
Details of the Survey	The user can define which report is to be sent to the defined recipient(s).

Table 16: Types of Dispatch

Password-protected sending of reports

If required, the opening of PDF reports sent per email can be protected by a password. The Administrator can define a password for this at “System Settings / evasys Settings/Email Functions & Accounts/Password protection for reports sent by email”. This password applies by default to all PDF reports sent in the context of central evaluation by Administrators and Subunit Administrators. If permitted, Subunit Administrators can overwrite the password for sending reports within their subunits.

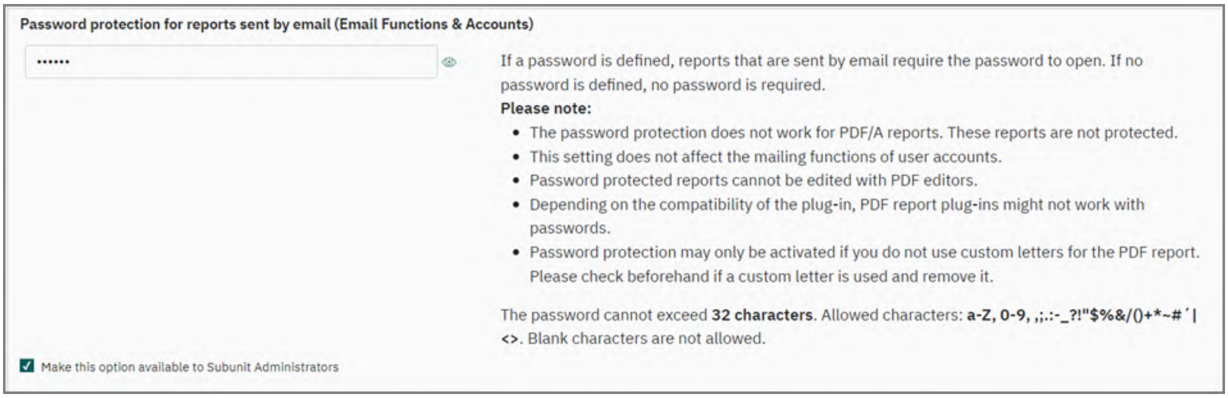


Figure 478: Password protection for PDF reports

The password protection is activated the moment that a password is stored and the setting saved. For as long as no password is stored, reports can be directly opened.

Please observe the following:

- Password protection is not PDF/A-compatible, therefore PDF/A reports are not protected. For further information on the PDF/A standard, see chapter B 4.7.13. “PDF Standard” below.
- The setting has no effect on emails being sent by active users (instructors/trainers/ project managers) and Report Creators.
- Password-protected reports cannot be edited with PDF editors.
- PDF report plug-ins that do not correspond to the standard report may not be able to use the password protection. In this case, information should be attained on the compatibility of the plug-in.
- The password may be 32 characters long at maximum. Permitted characters: a-Z, 0-9, ,;.:-_?!"$%&/()+*~#\´|<>. Empty spaces are not allowed. If the password does not comply with the rules, it cannot be used.

If a report recipient receives a PDF report per email and opens the PDF document in the attachment, then the password is automatically queried. The PDF report only opens when this is entered correctly.

Note:
Please note that the password protection is only valid for PDF reports. If you send along with the report, the raw data of the survey, they are not protected. Always turn off in this case, sending the raw data in “Settings/Configuration/E-mail Features & Attach accounts/CSV file”.

4.7.13. PDF Standard

evasys supports the PDF/A-2b Standard. This standard ensures that your PDF reports are suitable for long term digital preservation and are clearly able to be reproduced.

Note:
When using your own PDF templates your PDF reports are no longer PDF/A-2b compatible. This applies to reports whose cover letter was modified by your own templates (under System Settings/Documents" as well as "System Settings/Text Templates"). PDF report definitions are only then affected when for this questionnaire or in general your own PDF templates are used. Should you want to use PDF report plug-ins, please discuss the question of PDF/A-2b compatibility when creating the PDF plug-ins.

PDF/A Mode is deactivated by default but can be activated in the system settings under "System Settings/Report Settings/PDF/A Conformity". If PDF/A mode is not activated, you can copy content from reports, e.g. for further usage in discussions and presentations. When PDF/A mode is activated, the file is protected: no contents can be removed and the file cannot be edited at a later point.

5. Phase 4: Advanced Reporting

As soon as you have implemented surveys and scanned data, you receive the automatically generated reports. If you wish to process this data further, for example to summarize and/or compare it, there are extensive and flexible options in evasys available to you, as well as the export facilities into other programs. In the phase model this is the fourth of the five phases.

In this chapter, you initially learn what indicators are and how you can create them in evasys – since they form the basis for a certain type of summary reports.

You will then receive a comprehensive introduction to the options in producing summary reports. The creation of reports does not occur via the administrator access, but rather you must be logged in as a report creator. Often this role, however, is carried out jointly with that of the evasys administrator.

For expanded evaluations you can export the captured data from evasys. For this purpose, the CSV format as well as a specific format for import into the statistics program SPSS are available to you. The explanations of these export options bring us to the end of the chapter.

5.1. Indicators

5.1.1. The Principle of the Indicator

In the automatically generated PDF reports you receive an average value for all your scaled questions as an expression of how the respondents replied to this scaled question. In this example you see a question referring to the quality of the instructor:

Figure 479: Evaluation of a Scaled Question with Specification of the Average (Diagram Type: Histogram)

Optionally, you can also display a stacked bar diagram in addition to the classic indicator display (mean value/standard deviation). Please activate this function before in: System Settings/Report Settings/Configuration.

Note, that this display mode allows less space for the indicator pole labels. To adjust these settings, use the (+ and -) default settings under "Indicators: Left pole" and "Indicators: Right pole".

You can also define the bar colors under "Bar color: Color for answer option n".

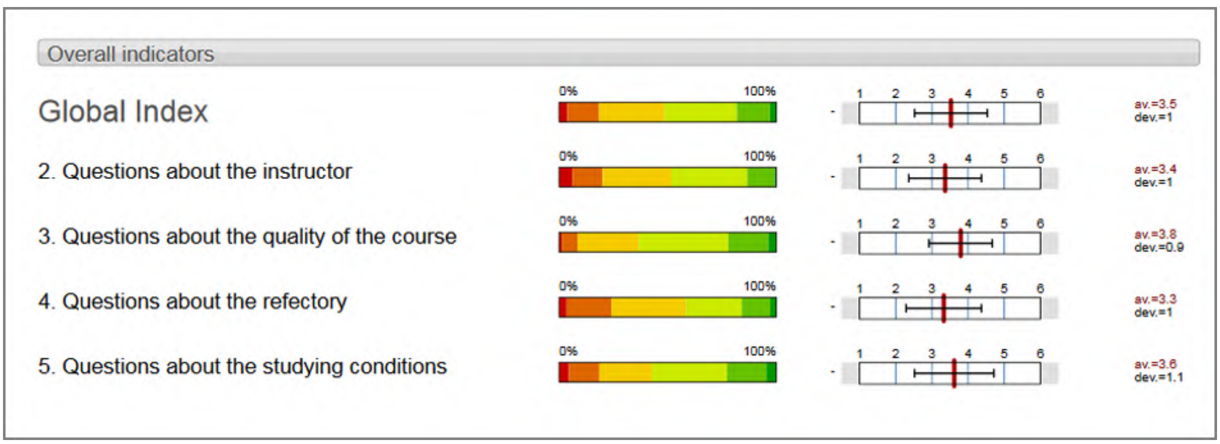


Figure 480: Activated Stacked Bar Diagram

With regard to the thematic direction and your own requirements, you will have divided the questions on your questionnaire into question groups. For example, one could assign all questions regarding the quality of the course to the question group “About the instructor”. You will then receive an average value for each of the scaled questions.

If you (or for example deans, department heads, etc.) wish to obtain a quick overview of the results of the survey, often not every single question may be of interest. One rather needs summary statements. If, therefore, you do not wish to view all questions separately, it is possible to calculate an average for the scaled questions of an entire question group, the so-called indicator. The indicator in evasys thus forms a question group average.

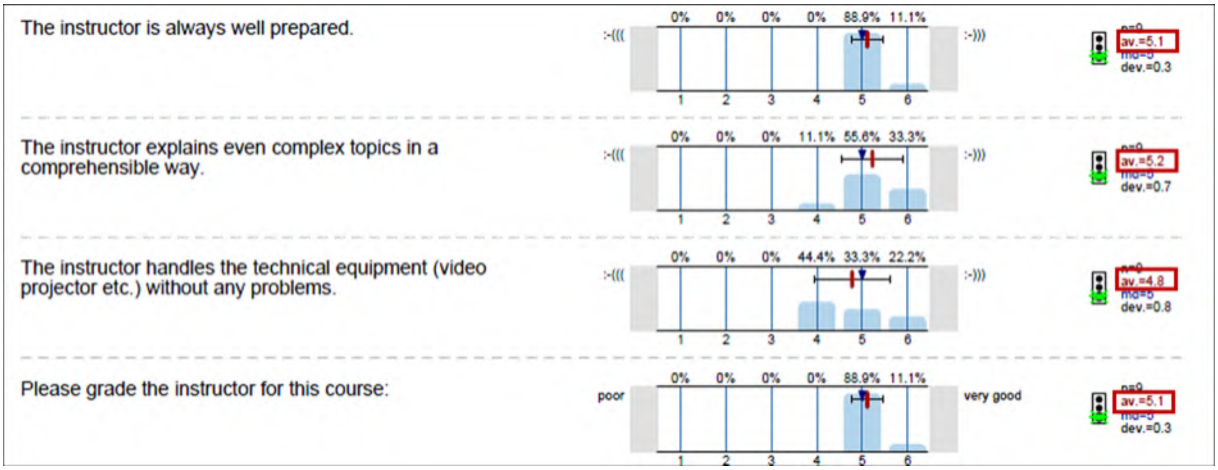


Figure 481: Evaluation of Scaled Questions of an Entire Question Group

Generally indicators can be regarded as kind of identification numbers which make a statement about the summarized items. (In evasys, for example, one question would correspond to one item.) This way the questioned values (for example quality of the course) are measurable and comparable. Of course, an indicator can only give an accurate overall statement when the single questions can actually make a contribution to the statement.

For the calculation of the indicator in evasys all results of the scaled questions are added. The sum of them is divided by the number of responses. (Thus, the already calculated averages of the single questions are not used for this!) This means that questions with a smaller number of valid responses (for example with abstentions or invalid responses) have a smaller influence on the indicator than questions with a higher number of valid answers. The questions which do not reach the minimum response rate are not considered in the calculation of indicators.

Example:

Your questionnaire contains for example a question group “Instructor” with the following three scaled questions (for clarity reasons, fewer questions than displayed above are used):

Question 1: The instructor masters his field.

Question 2: The instructor openly takes on board questions and comments.

Question 3: The instructor knows how to present the topic interestingly.

You hereby use a scale with six response options with the bad values lying to the left and the best values to the right.

To question 1 the following five valid responses are given (here, for clarity reasons, also an unusually small number):

3, 4, 2, 5, 4 - Average of this question = (3 + 4 + 2 + 5 + 4) / 5 = 3.60

For question 2 a respondent put two crosses, this answer is, therefore, invalid. The following four valid responses remain:

1, 4, 2, 4 - Average of this question = (1 + 4 + 2 + 4) / 4 = 2.75

Question 3 was ticked only three times, the other two respondents did not give a *response. These three answers are valid and read*

5, 6, 5 - Average of this question = (5 + 6 + 5) / 3 = 5.33

Now an indicator is calculated for this question group. evasys needs the responses to the corresponding scaled questions for that, adds them and divides them by the total number:

Indicator = (3 + 4 + 2 + 5 + 4 + 1 + 4 + 2 + 4 + 5 + 6 + 5) / 12 = 3.75

If one adds the three averages and divides them by the number of averages – which does not correspond to the calculation of the indicator! - one receives another value:

(3.60 + 2.75 + 5.33) / 3 = 3.89

Note:
One recognizes clearly that the calculation of the indicator which is weighted according to the number of answers given, produces a very different result than the calculation through the averages that are available (which does not take into account the number of the responses, but which rather counts the questions each as “1”).

Only through taking into account several indicators you receive an overview of the entire survey. The summary of several indicators produces an index. In evasys all indicators of the questionnaire (meaning this index for the total questionnaire) are calculated into the so-called overall indicator that thus forms a type of “grade” for the total survey.

The overall indicator, in contrast to individual indicators, is not calculated using individual results. The overall indicator is calculated by adding the individual indicators and dividing the sum by their total number. Please note that the calculation does not use the indicator shown in the PDF report, which has been rounded to two decimal places, but instead uses the original, full indicator, which can include more than two decimal places.

Example:

On your questionnaire there are three question groups which contain scaled questions:

Question group “Instructor”

Question group “Course”

Question group “General assessment”.

The answers show for the first question group an indicator of 3.75, for the second question group one of 3.7, for the third group one of 2.9. (The scale consists – as mentioned – of six response options with the positive values on the right.)

The overall indicator for this questionnaire is made up from the addition of the three indicators mentioned as well as from the division by three (number of indicators):

(3.75 + 3.7 + 2.9) / 3 = 3.45

The overall indicator is therefore 3.45.

It is a reference to the survey's overall result. On the basis of your scale – a scale with *six options – and the assessment (positives on the right) you can now recognize, for example, that the result sits to the right from the middle, therefore, it is relatively good.*

Note:
You can recognize from this example how important the division and alignment of the scale is for the interpretation of the results. Since the values on which the scale is based form the basis for the calculation of the indicator, you must be sure to use absolute standardized scales on the questionnaire. Within a question group only the questions of a defined scale can be used for the calculation; a comprehensive change in the question group scale (for example from a 5er-scale to a 6er-scale) would make an overall indicator hard to interpret.

In order to really be able to interpret the indicators produced, one must know how other surveys turned out. For this you can fall back on norming.

5.1.2. Activating the Indicators in the Configuration

If you wish to utilize the calculation of indicators, you must first activate them in the configuration of each PDF report.

For this purpose, you call up the option “Configuration” in the menu “System Settings/ Report Settings”. Here you can activate or deactivate the indicator overview in the report. Please bear in mind, that you have to define the configuration for each of your PDF reports.

If you activate the calculation of the indicators here, the indicator and standard deviation are displayed at the beginning of the PDF report as a bar diagram. On the margin you can also see both of them as numerical data:

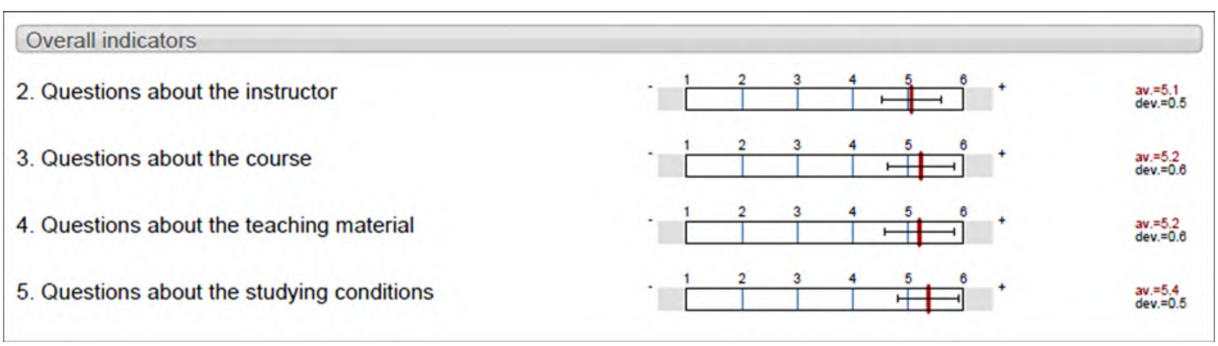


Figure 482: Indicators: Display in the PDF Report (Without Overall Indicator)

Other display options are also available for indicators, such as a profile line for indicators, calculation of the global indicator, display of stacked bar diagrams, etc. All settings are made in the report settings. For further information, please see chapter B 4.7.7. „Report Elements & Settings“, here the sections “Indicator Overview“ and “Profile Line for Indicators“.

5.1.3. Creating the Indicators for a Questionnaire

Since the indicators form the averages of particular question groups, they are also activated for particular question groups in the relevant questionnaire.

Hint:
As you know, you can no longer change a questionnaire once you have created a survey with it. You can, however, create the indicators at any time, even after the creation of surveys!

To do this, navigate as usual to your questionnaire and open the editing screen (in the main menu “System Settings”, select “Questionnaires” in the left submenu, select in the drop down-menu below “Action” the option “Edit”).

Open the editing window of a question group (by double-clicking on the question group or by clicking on the question group and selecting the option “Edit Question group” in the menu “Edit”). As described above, for the indicator only scaled questions are used, meaning that the definition and calculation of an indicator only makes sense for group questions that indeed contain scaled questions.

You see the following window:

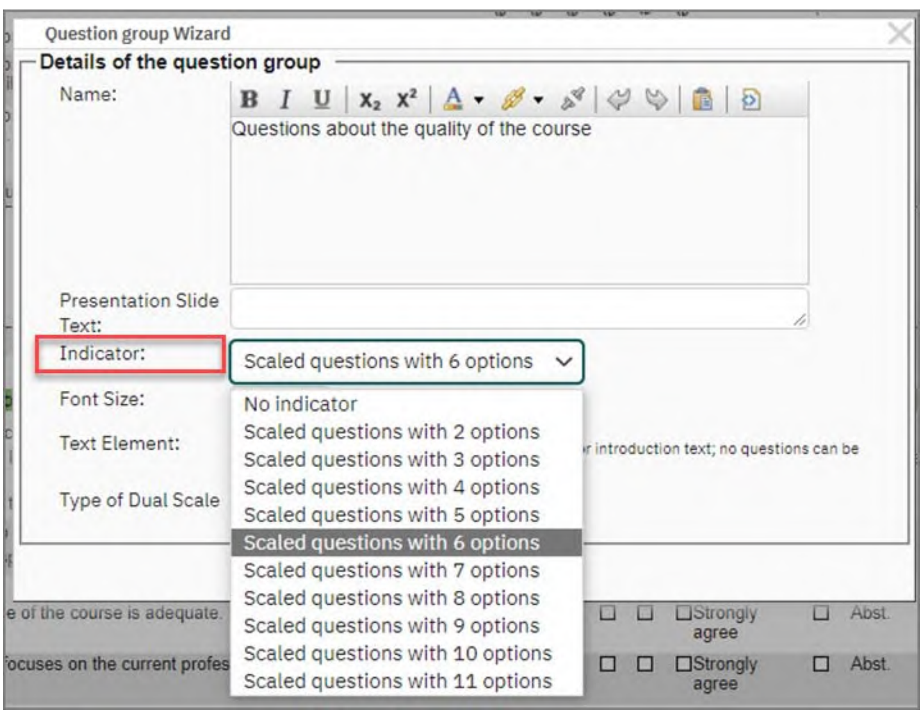


Figure 483: Indicators: Editing Window in the Question Group

The first specification of the window refers to the heading of the question group, this, however, is possibly grayed in, since you can no longer change it once the surveys have been created.

Below it (and possibly the presentation slide text) you find information on the indicator. If no indicator has been created so far, it reads “No indicator”. When you open the drop-down menu, you see that you can also select an indicator for all kinds of scales.

Make your desired selection here – according to the scale of your scaled questions – and close the window by clicking on [Apply].

5.1.4. Internal Consistency of the Question Group: Cronbachs Alpha

In evasys, Cronbach’s Alpha describes the internal consistency of a question group. This value indicates whether the items of a question group are meaningfully related to each other and can thus be seen as capturing the concept the question group is meant to measure.

Note:
Please note that a survey participant must answer all questions of a question group if his answers are to be included in the Cronbachs Alpha calculation.

Cronbach’s Alpha can range between minus infinity and 1; however only positive values have a meaningful interpretation. A value of 0 means that the items (i.e. questions) are not associated which each other at all. A value of 1 would be the strongest relationship between questions that is possible. In general, with a value of 0.7 or above the scale (i.e. question group) can be considered as reliable.

The table below gives a guide how different values of Cronbach’s Alpha can be interpreted:

Cronbach's Alpha Value	Interpretation
> 0.9	Excellent
> 0.8	Good
> 0.7	Satisfactory
> 0.6	Questionable
> 0.5	Poor
< 0.5	Unacceptable

Table 17: Interpretation of Cronbach’s Alpha

Note:
Please note that the value of Cronbach's Alpha increases automatically when

- question wording differs only superficially from each other
- a question group has a large number of questions; in this case the statistic has to be interpreted with care

When activated in the PDF report settings, Cronbach's Alpha is given in the PDF report for each indicator (menu “System Settings/Report Settings/Configuration/Cronbach’s Alpha”). Cronbach’s Alpha can only be displayed if the indicators of the corresponding questionnaire have been defined previously.

Figure 484: Display of Cronbach’s Alpha in the PDF Report

Evasys calculates Cronbach's Alpha with the following formula:

$$\alpha = \frac{N \cdot \bar{r}}{(1 + (N-1) \cdot \bar{r})}.$$

N = number of items (i.e., questions in question group) and r ? = ratio of covariance : variance (average correlation between items)

In order to determine $\bar{r}$, the covariance for all possible combinations of questions is calculated, as well as the variance for all questions of the question group. The resulting values are averaged and the ratio between them is determined in order to calculate the average correlation between the questions in the question group.

In order to calculate the covariance for each question of the question group, the difference of the given responses to the respective arithmetic mean is calculated. These values are multiplied for all possible combinations of questions and their sum divided by n - 1 (n = number of responses).

$$S_{x,y} = \frac{1}{n-1} \sum_{i=1}^{n} (x_i - \bar{x}) \cdot (y_i - \bar{y})$$

The variance corresponds to the sum of the squared differences of the response values to their respective arithmetic mean value, divided by n - 1 (n = number of responses).

$$S^2 \ (\text{oder } \hat{\sigma}^2) = \frac{1}{n-1}\sum_{i=1}^{n}(x_i - \bar{x})^2$$

5.1.5. Free Indicators

In general, the question groups containing the questions on the questionnaire form the basis for the calculation of the indicators, this means, that question group and indicator are consistent with regard to the questions included. It is also possible to freely define indicators, so that questions of different question groups can serve as the basis for the calculation of an indicator. The elements of an indicator are, as such, freely distributable throughout the questionnaire. These so-called “Free Indicators” can be stored separately for each questionnaire and displayed later in the PDF report in place of the conventional indicators.

The “Free Indicators” can be defined in the questionnaire details (drop-down list in the area “Advanced Settings”, option „Free Indicators“).

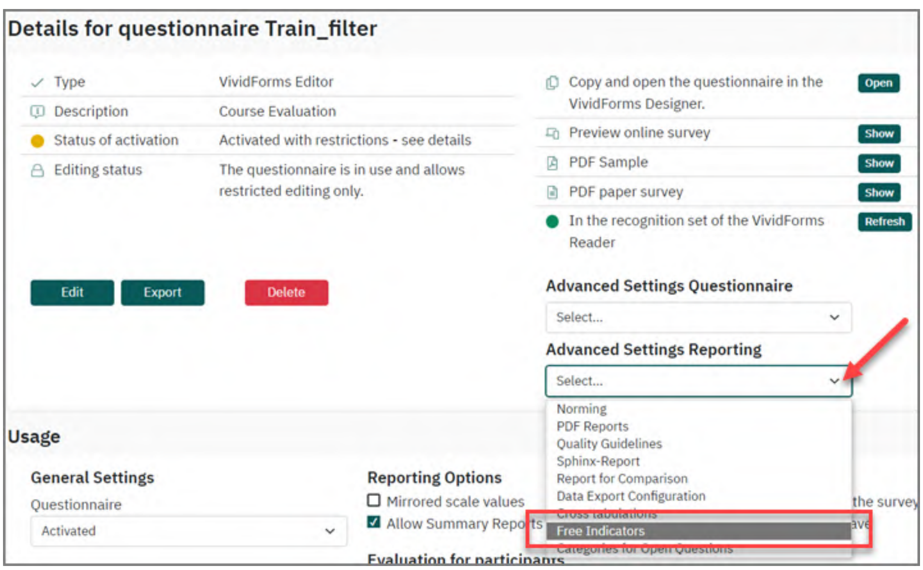


Figure 485: Free Indicators: Access in the Questionnaire Details

After clicking on the button [Edit], the window for setting the indicators opens automatically. Now question groups can either be converted to indicators and be subsequently processed, or the indicators can be defined freely.

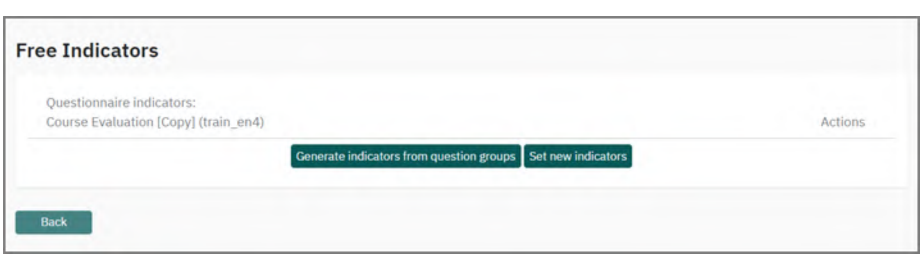


Figure 486: Free Indicators: Setting

By clicking on the button [Generate indicators from question groups], the indicators are established based on the question groups on the questionnaire and the scaled questions contained therein. This compilation can be subsequently edited by using the pencil icon, so that the questions of an indicator can be freely distributed throughout the questionnaire.

By using the arrows, the indicators can be moved up or down. The indicators can be deleted at any time by clicking on the red cross.

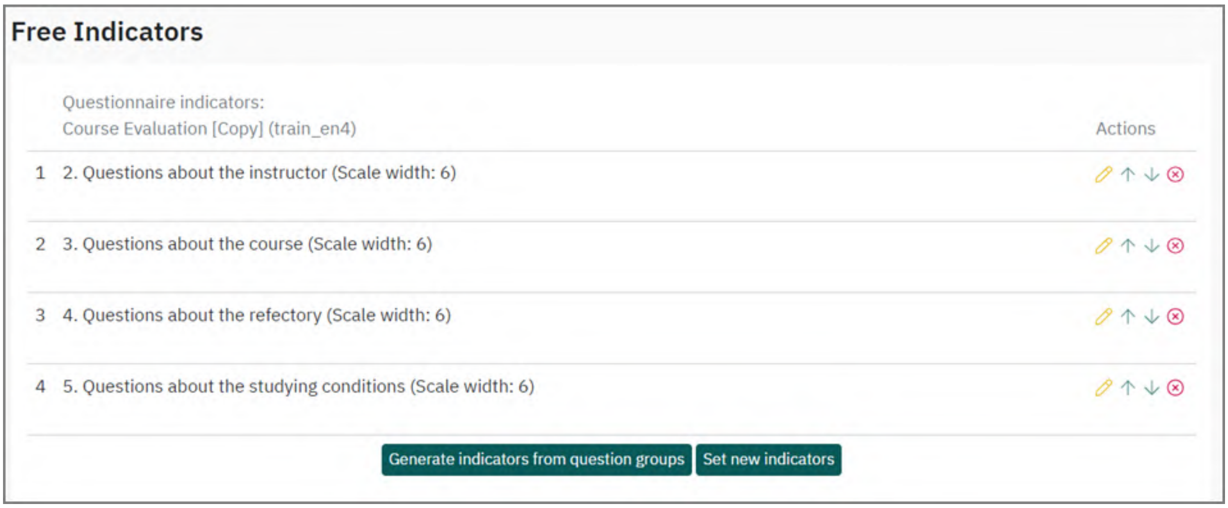


Figure 487: Free Indicators: Generate from Question Groups

To edit an indicator, click on the pencil icon. An overview of the questionnaire is now shown.

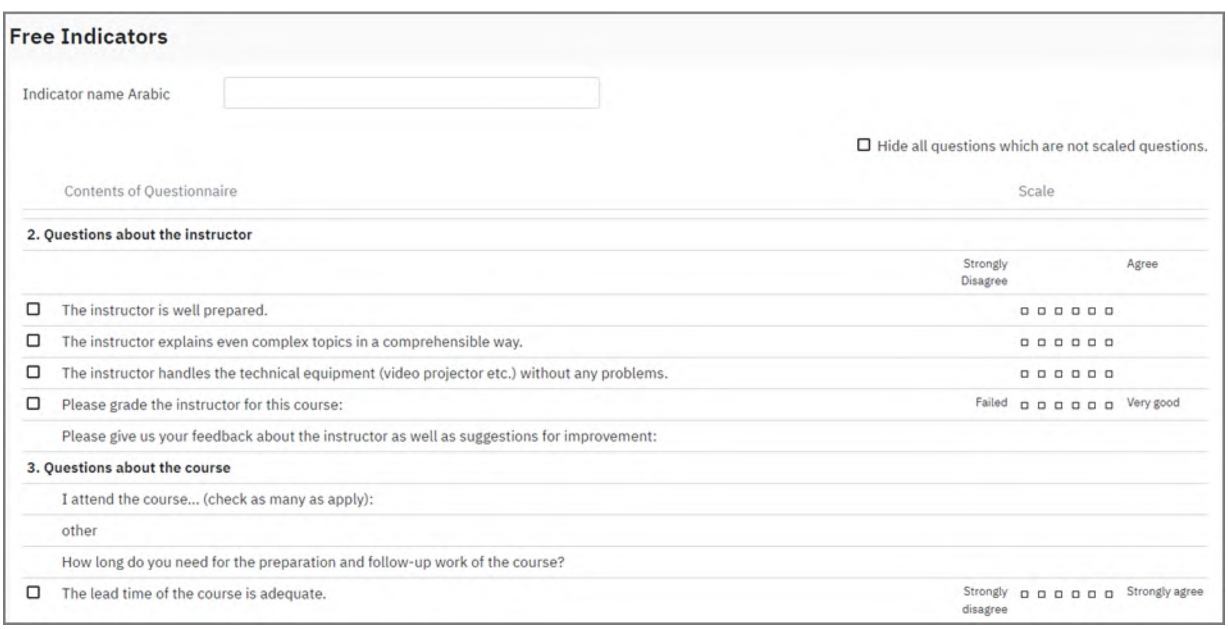


Figure 488: Free Indicators: Editing

Initially, the indicator name is displayed and can be changed as desired. If the questionnaire exists in different languages, the indicator name must also be deposited for each respective language (in this case, German and English). In order to achieve greater clarity, it is possible to hide all questions that are not of the scaled question type. Via the selection box in the left column, the questions relevant to the indicators can now be selected or deselected. Please save your changes by clicking on [Save] at the bottom of the page.

Using the button [Set new indicators] the indicators can be set up manually. After clicking on the button, the questionnaire is shown in the overview. Again, a name for the indicator must first be given, and then the individual questions can be selected by activating the checkbox. By clicking on [Save], the new indicator is added to the list of indicators.

Free indicators are displayed in the PDF report, if the calculation of indicators is activated in the configuration of the PDF report:

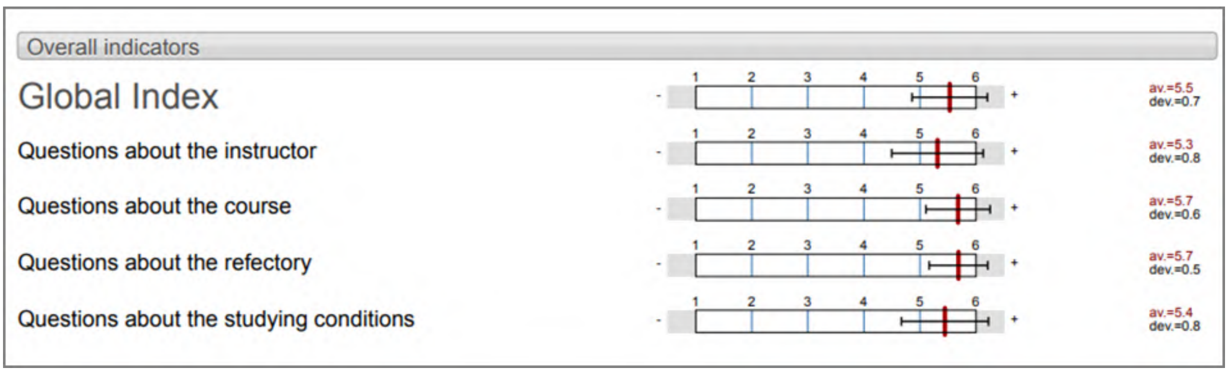


Figure 489: Free Indicators: Display in the PDF Report

Note:
Free indicators can only be used for display in the PDF report. They cannot be used as a basis for quality guidelines or norming nor in overall reports in the report creator. Here, in general, only the indicators of the question groups are used. Also, Cronbach's Alpha cannot be calculated for free indicators.

5.2. Creating Reports and Comparative Profile Lines

As soon as you have scanned data into evasys for a survey and/or received data during online surveys, a PDF report is generated automatically with this data. The more data you scan, the more important it is to be able to compare and summarize this data. For these purposes there are several aids available in evasys. One of these are the functionalities of the so-called report creator which are presented in the following.

- The User Role of the Report Creator
- General Options during Report Creation
- Creating Summary Reports
- Kinds of comprising Reports

- Combinations and Subgroups
- Information on a Report: Report List
- Information on a Report: Detailed View
- Dispatch Comparative Profile Lines
- Result Reports
- Integrating Profile Comparison Lines in the PDF Report

5.2.1. The User Role of the Report Creator

The report creator is a user created by the evasys administrator in order to produce summary reports for the captured data and to send comparative profile lines. In practice, the person in charge of the system's administration often also takes on the function of the report creator, too. Administrator and subunit administrators can therefore also take on the role of Report Creator in their user profile. In order to be able to separate the functions, there is a separate user role for the report creator in evasys. Of course, multiple report creators can be created in the system.

Note:
The reports which the report creator produces are based on the data already captured. That means that first you must implement and evaluate surveys before you can use the report creator.

Fundamental Considerations and Settings

First of all it is important that you carefully consider what insight the report creator should be permitted to have or must have:

- Is the report creator supposed to summarize the data of the entire system? In this case, please note that s/he can then also view this data. If you decide on this option, you need a system-wide report creator.
- Or, s/he should only view data subunit-wide? That also means, however, that s/he cannot produce subunit-comprehensive summary reports, or comparisons, respectively. In this case you should define subunit-wide report creators.
- If your report creator may access several subunits please choose the option “own subunit” in the area „Data access“. Subsequently mark all necessary subunits in the area „Assign additional subunits“. Thus your report creator accesses several subunits. Multiple selections of subunits can be made by pressing and holding down the “Ctrl” key.

As an Administrator, you set this value when creating the relevant user account. As soon as you create a report creator, a particular setting in the user rights (step three of three) allows you to define the report creator as system-wide (system level), subunit groups (own subunit and selection of further subunits) or only subunit-wide (own subunit):

It is crucial to consider what exactly the report creator should be able and allowed to do, in order to subsequently know where and how the report creator be created or whether several are required.

When an administrator or subunit administrator directly adopts the additional role of report creator in his user profile, s/he also automatically receives the same data access rights as the administrator/subunit administrator himself.

Creating a Report Creator

Just like any other user, a report creator is a user that is created in a subunit.

If your report creator is supposed to work only subunit-wide, you create him in the subunit for which s/he is to produce summaries. If the report creator works globally, you can create him in any subunit at all since s/he can have insight into all data. For example you can create a subunit “System users” where you put all users, such as the report creator, the data entry assistant, the verifier etc. so as to find them again fast.

Go to the respective subunit and click on [Create New User].

The input window which opens should be familiar to you from creating instructors and other users. In the way you are accustomed, enter the data for the person who will act as report creator. It is crucial that you choose the user type “report creator” (instead of “instructor” and the like):

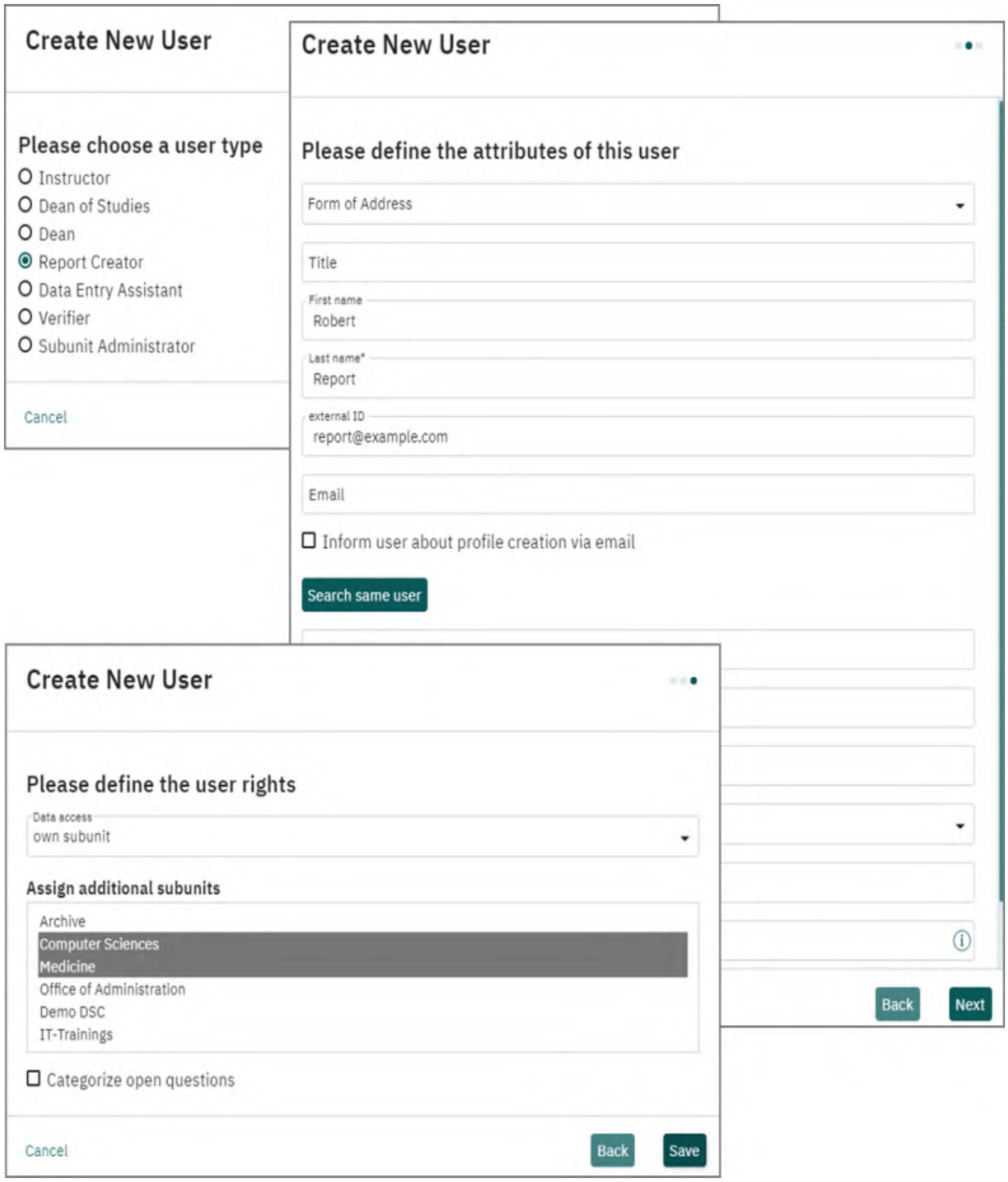
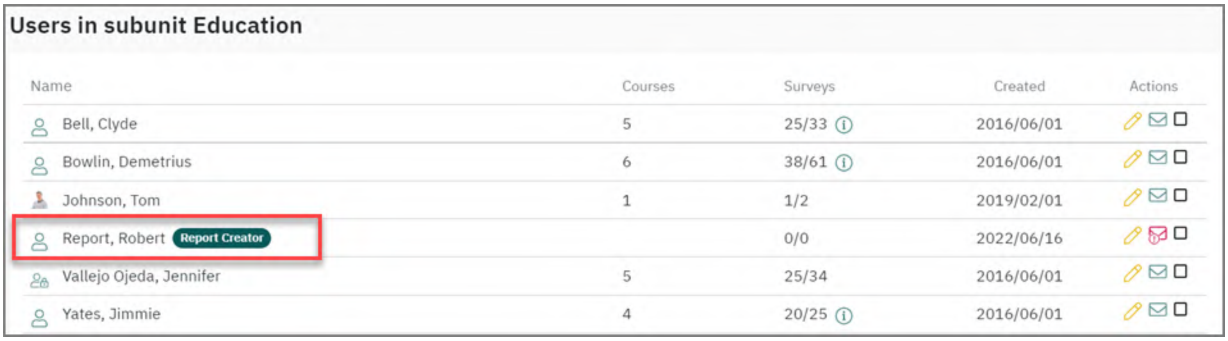


Figure 490: Creating a Report Creator

In the third step you define the data access of your report creator. By default the report creator only has access subunit-wide. As administrator you can also allow system-wide access. Furthermore, you can decide whether report creators shall be allowed to create their own categories for the categorization of open questions, or if they are only allowed to use categories pre-defined by the administrator/subunit administrator.

Note:
As a subunit administrator, you can only assign subunit-wide access to your Report Creator.

As soon as you confirm your input by clicking on [Save], the report creator appears in the user list.



Users in subunit Education

Name	Courses	Surveys	Created	Actions
Bell, Clyde	5	25/33	2016/06/01	
Bowlin, Demetrius	6	38/61	2016/06/01	
Johnson, Tom	1	1/2	2019/02/01	
Report, Robert Report Creator		0/0	2022/06/16	
Vallejo Ojeda, Jennifer	5	25/34	2016/06/01	
Yates, Jimmie	4	20/25	2016/06/01	

Figure 491: Report Creator in the List of all Users

Give the login name and password to the person acting as the report creator. They can then log in. Of course, you can also use this account for yourself.

Login and First Steps

In order to be able to log on as report creator, open the usual evasys start page.

As soon as you have logged on here, the start screen of the report creator appears, offering you on the left-hand side a menu with various options:

- The option “Reports” allows you to download reports on indicators (see chapter B 5.1. "Indicators") which give the university management and/or the management of your company an overview of the assessment the courses.
- By the option “My profile” you can change the user data of this report creator access (for example password, language, etc.).
- The utilization statistics give you an overview of the activities of this report creator (for example the number of the log-ins, the created folders, etc.).
- “Deliveries” informs you how many emails the report creator has already sent.
- The field “System Info” gives you an overview of the address data of the organization as well as of the individual subunits.
- Clicking on the option “Send email” opens a page that enables you to send an email to any address.
- The option “Manual” below provides you with further information on evasys and the use of the program. Here you have access to the online user manual for all active evasys users (explaining the essential points on the user access in a much more compact fashion than the User Guide at hand does.)
- “Creating Questionnaires with VividForms Editor” explains the creation of questionnaires with the VividForms Editor.

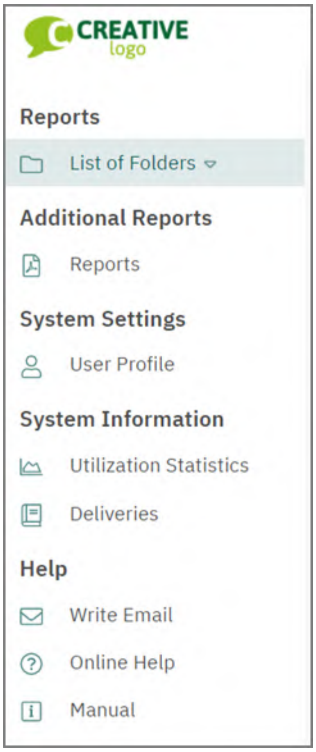


Figure 492: Report Creator: Main Menu

If you wish to create summary reports or send out profile lines, this is not possible without a folder. Therefore, you should initially create a new folder by clicking on the button [Create New folder]:

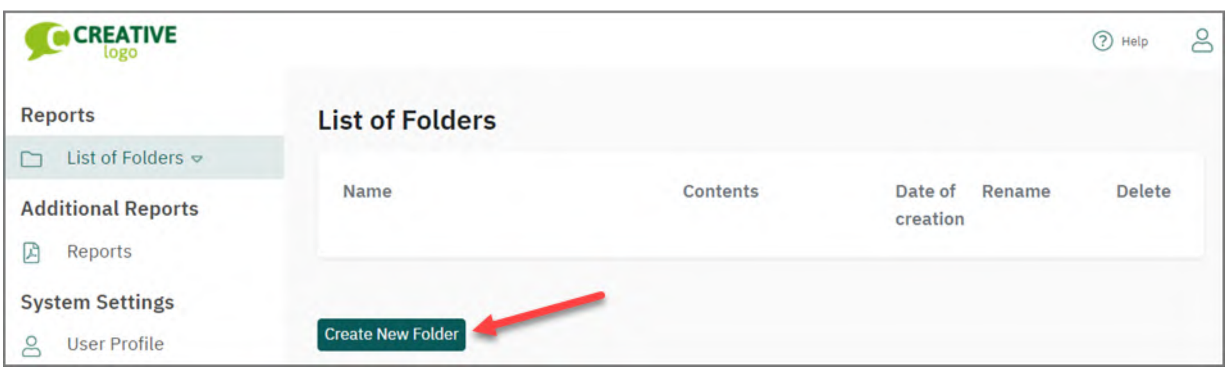


Figure 493: Report Creator: Creating a Folder

After clicking on the button, a window appears in which you can name your folder:

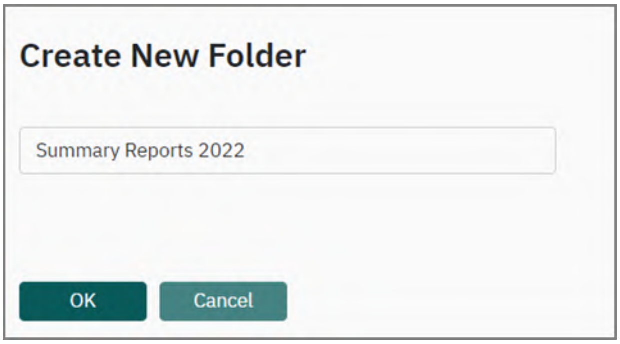
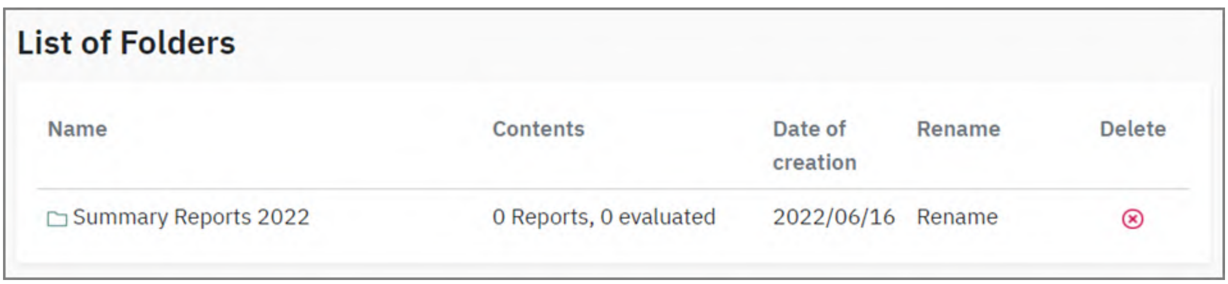


Figure 494: Report Creator: Naming the Folder

According to the type of your summaries planned, you should choose a suitable structure for your folders.

You could, for example, arrange the reports according to years and choose names such as “Surveys 2011”, etc.:


List of Folders

Name	Contents	Date of creation	Rename	Delete
Summary Reports 2022	0 Reports, 0 evaluated	2022/06/16	Rename	

Figure 495: Report Creator: Folders structured According to Years

The university or company structure could also be a possible way to organize your folders, e.g. according to departments.

Only in a folder can you use the possibilities of the report creator, for example to summarize reports.

The report creator can always move existing reports from one folder to another. To move a report, click on the folder containing the report to be moved. Then, click on the name of the report to be moved. You are automatically switched to the details of your report. Here, click on “Move Compilation”. Now the report can

- either be moved to an existing folder, by selecting the relevant folder in the drop-down list in the area “Folders”
- or you create a new folder. Enter the name of the folder in the area “Create in a new folder”.

In both cases, confirm moving the report by clicking on the [OK] button.

5.2.2. General Options during Report Creation

The options during report creation are presented to you as soon as you wish to create a report. You can see them in the figure below the report name (which here reads “Show_Options”):

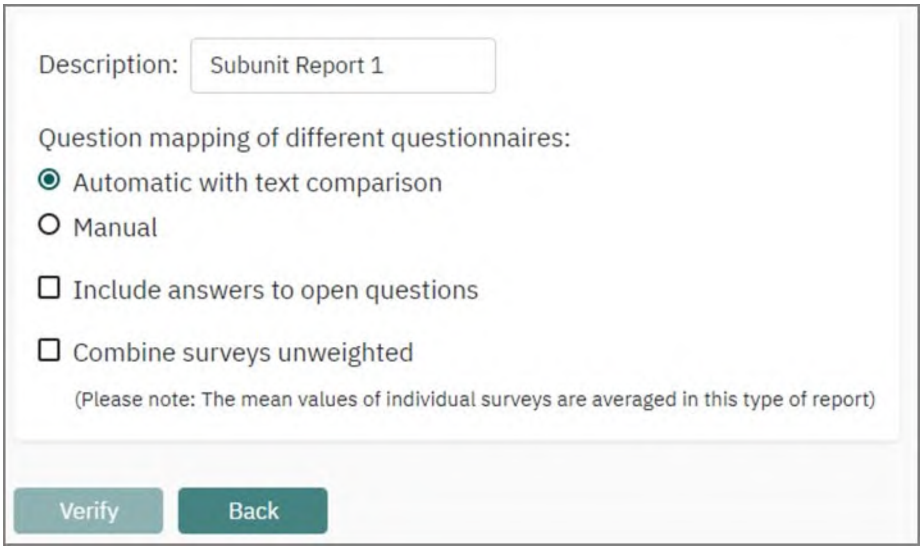


Figure 496: Report Creator: Options During Report Creation

The following options are offered to you:

- Question mapping of different questionnaires: Summary of surveys that were carried out with different questionnaires
  - Options: Automatically with text comparison and manual assignment
  - Condition: the questionnaires are similar and therefore comparable.
- Include answers to open questions
  - Should all responses to open questions be displayed in the summary?
  - The responses to open questions are not always of interest in more extensive summaries since they do not serve the quick overview, but rather they provide details. Furthermore, they may possibly lead to very long reports.
- Selection between weighted and unweighted compilation
  - By default, the reports are summarized weighted, meaning that the calculation is effected according to the number of returns.
  - This means for example: If you summarize a survey with 100 return questionnaires and one with 10, the survey with 100 questionnaires counts for more than the one with 10.
  - Mathematically expressed: All individual results are each summed up for each question (each single value that was ticked off) and divided by the total number of results (in this example: 110).
  - You explicitly have to decide on an unweighted compilation whilst creating a report. It is to be noted that this type of calculation removes the possibility to adequately undertake further processing in statistics programs.
  - Because with weighted compilations, each survey counts as 1, regardless of how many questionnaires have been processed for it.
  - Mathematically expressed: You add the respective averages of the questions and divide these by the number of the surveys/reports that you are summarizing (in the example above, therefore, by 2).

Since the questionnaire comparison represents a very important option, whose possibilities can facilitate your work, this is outlined more precisely in the following.

Options during Report Creation – Questionnaire Comparison

There are often cases in which it becomes necessary to modify an existing questionnaire.

Example:

You have been evaluating with one questionnaire for three years. The computer center would like to use the general evaluation and to integrate a question to your questionnaire regarding the equipment of the computer rooms.

Or you have been evaluating with one questionnaire for three years and now the corporate identity of your university/company changes vastly. This also affects names such as "Technical University of Sample City" which is renamed in "University of Applied Sciences Sample City". Furthermore, the subunits and graduation titles now carry other names (for example "Department Electrical Engineering" instead of "Faculty Electrical Engineering", "Master" instead of "Diploma" and so on).

These linguistic changes affect of course the questionnaire which must be clearly adjusted.

A questionnaire which has been evaluated can no longer be changed. In these cases you have to copy an existing questionnaire and work on the copy. For information on copying questionnaires see chapter B 2.3.2. "Questionnaire administration".

After the evaluation with the new questionnaire consideration has to be given as to how one can compare the results with the old reports and/or compile the results of the different reports. The solution is the questionnaire comparison via the option "Question mapping of different questionnaires" in the report creator:

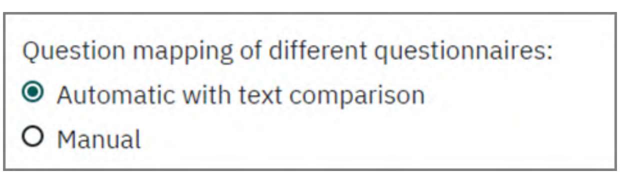


Figure 497: Report Creator: Question Mapping of Different Questionnaires

Whenever you compile reports that are based on different questionnaires, here you must select whether to have the questionnaires compared automatically or want to assign them manually. In either case it is important that the questionnaires are comparable, meaning that they are similar:

- The **automatic assignment** is advisable when the questionnaires are nearly identical – for example when only one question was added (such as in the first example).
  - The questionnaires are compared with each other by pure string comparison. (In computer science, a "string" is a sequence of letters and special characters, i.e. a character string.) evasys thus lays the character strings over one another and checks them for identity. Decisive is, therefore, the number of different characters in the questions and the level of marking.

- When you choose “Automatic with text comparison” a page opens where you can view the result of the text comparison. The left questionnaire is the “basis questionnaire”, the wording of which is carried over into the report:

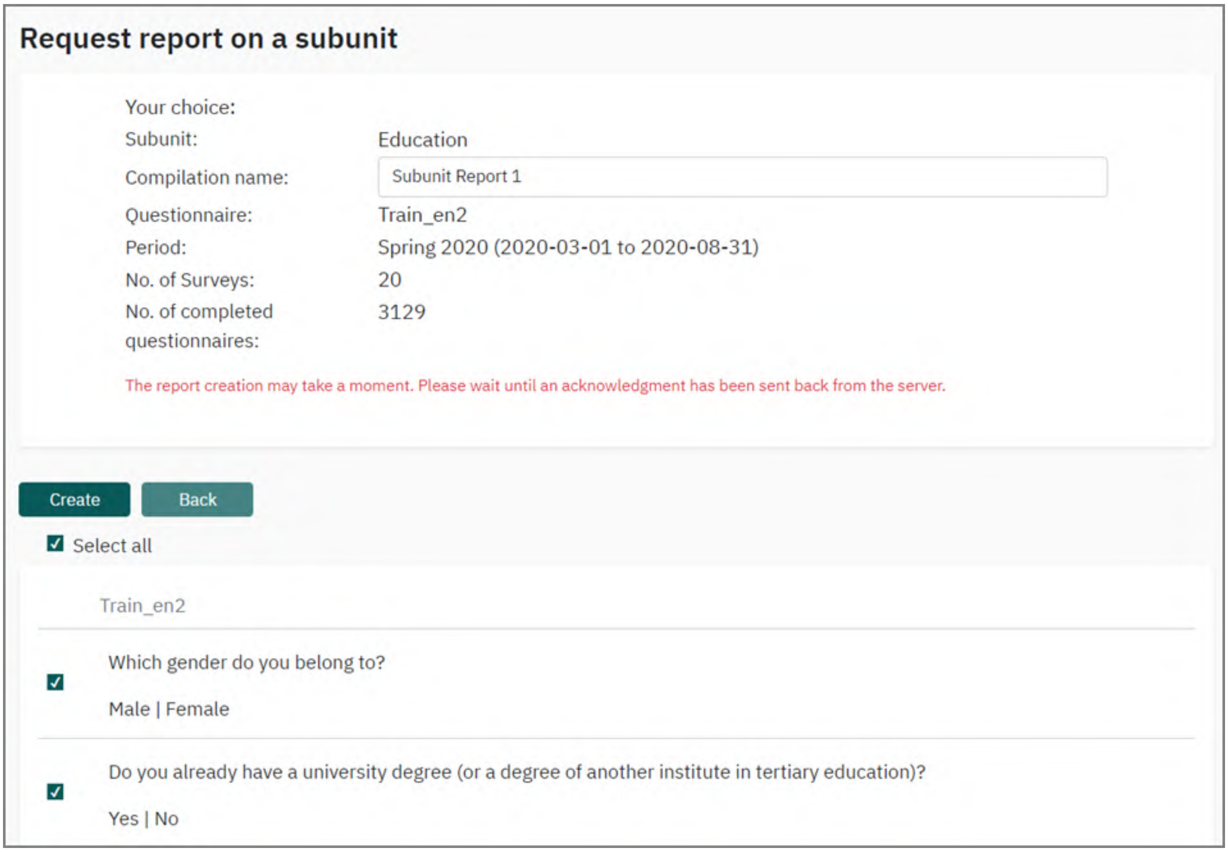


Figure 498: Report Creator: Automatic Questionnaire Comparison (Overview)

- On the bottom of the page you can change the basis questionnaire.
- Furthermore, you can specify by how many characters the questions and/or the modality text (texts describing the check mark boxes) can vary:

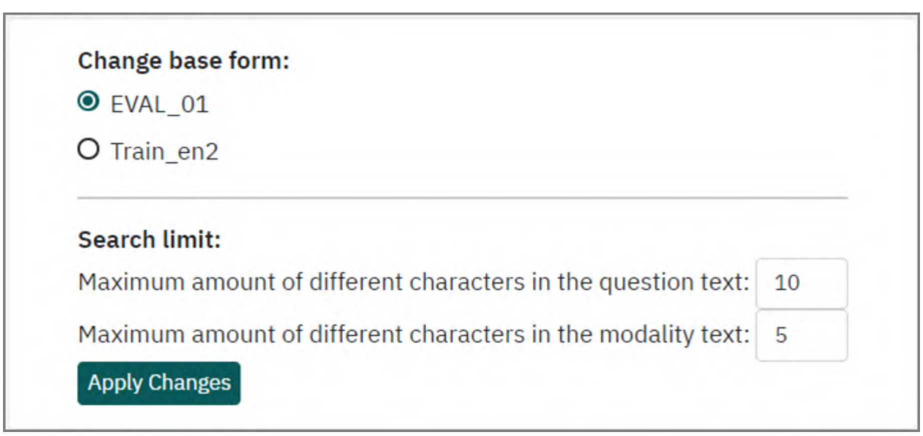


Figure 499: Report Creator: Define Base Questionnaire/Number of Different Characters

- Additional questions are of course not included in the total report because they cannot be compared to questions from the comparative questionnaire.

- You should opt for **manual assignment** when the questionnaires differ greatly, so that a string comparison cannot turn out any similarities (as in the second example).
  - If you choose this option, the questions on the manual assignment are presented to you in the following screen. The drop-down menu of each question presents you with the possible questions which you could select as an appropriate counterpart:

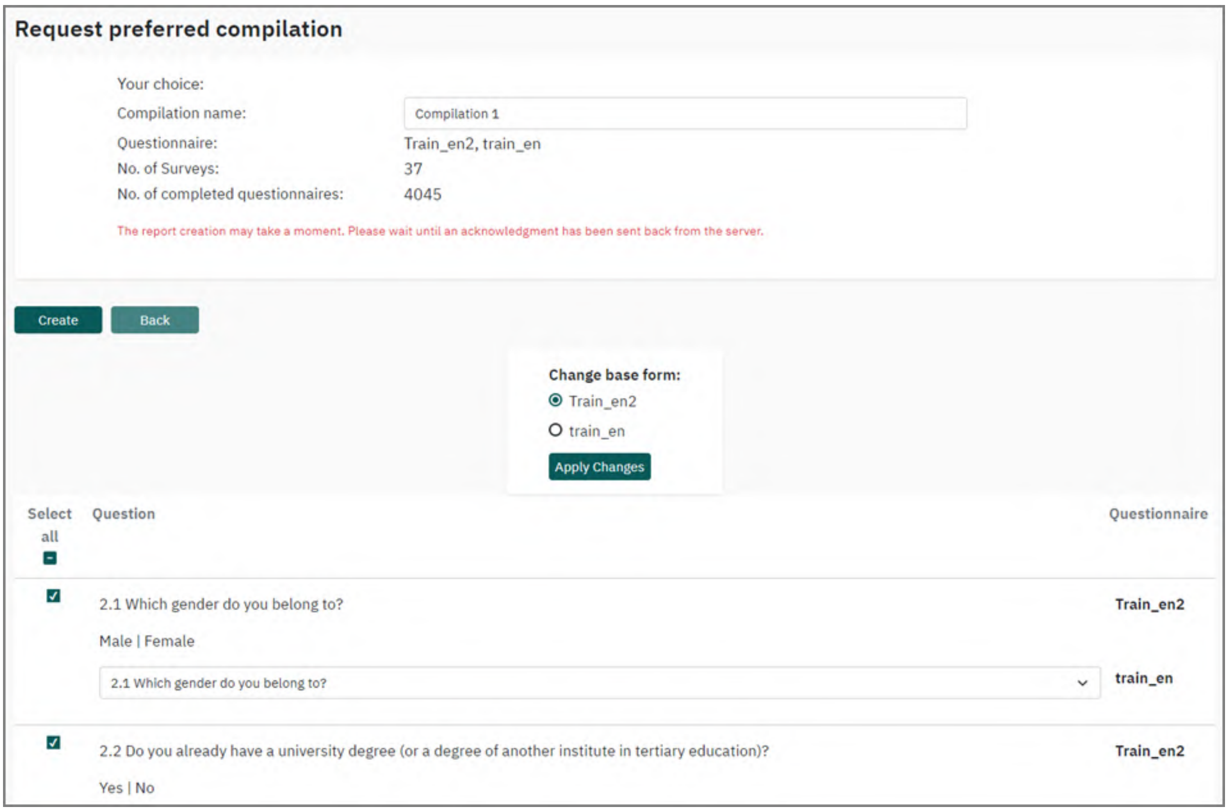


Figure 500: Report Creator: Manual Questionnaire Comparison

  - Here you can also define a base questionnaire at the end of the page.

5.2.3. Creating Summary Reports

The report creator has several options to process data. One of them is the creation of summary reports. This report creation is extremely flexible, you can create reports according to all imaginable criteria, summarizing these afterwards again and also taking the created reports apart again according to criteria defined by yourself. You will see that in this way the report creator answers many questions and accommodates numerous requirements.

It is important to know that the reports of the report creator have the same properties as the reports which you are familiar with from the automatically generated PDF reports:

- The analyses on the single questions of your questionnaire look the same, for example a bar diagram for the single choice and multiple choice questions, (depending on the setting) a histogram for the scaled questions, the handwritten and/or typed comments on the open questions and so forth.

- The elements which the administrator has set in the menu “System Settings/ Report Settings/Configuration” also appear in these reports. The exception is the letter which the report creator does not produce.
- If for relevant questionnaires extended PDF report definitions or multilingual questionnaires exist, these settings also apply to the summary reports (that are produced for the respective questionnaire). This means that you can also download an adjusted and/or multilingual report.

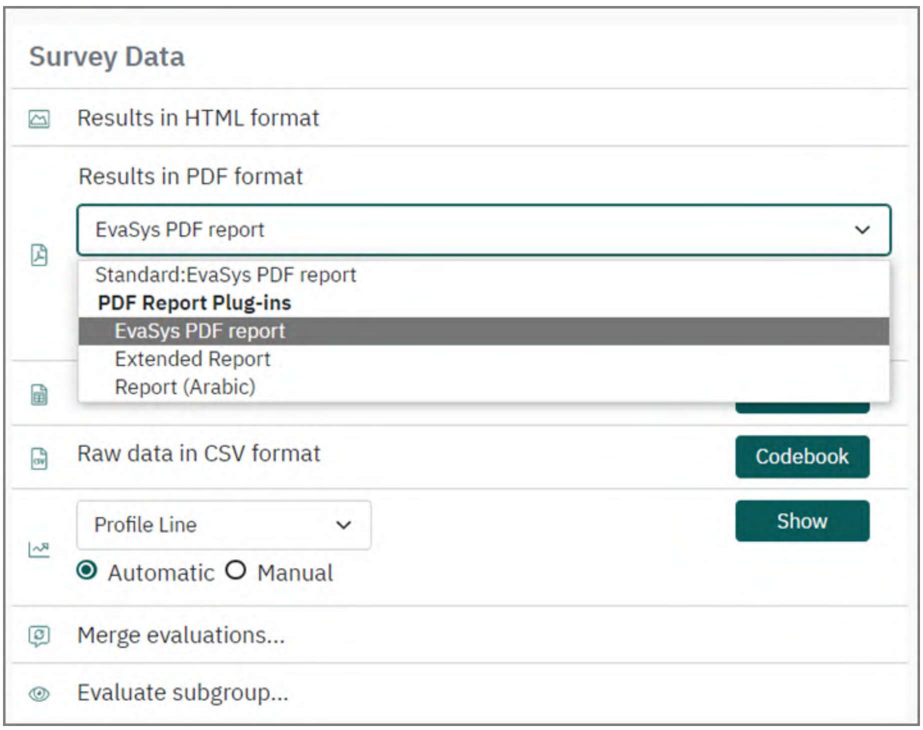


Figure 501: Report Creator: Report Selection

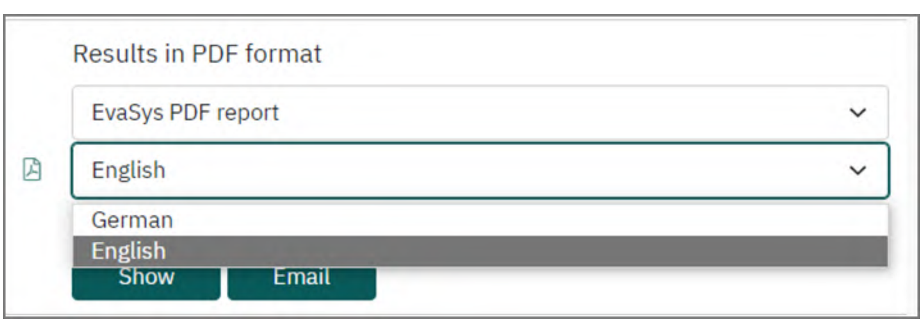


Figure 502: Report Creator: Multilingual Reports

- Also the usual export options are available (CSV, Sphinx and SPSS).

Figure 503: Report Creator: Export Options

The summary reports give you – unlike the usual automatically produced PDF reports – an overview of your evaluated data. Because depending on your choice, a summary report is generated for a subunit, for an instructor, for a course of studies etc. This report looks just like the automatically produced PDF report, yet it provides you with information on the corresponding assessment results of entire subunits, etc.

5.2.4. Kinds of comprising Reports

There are four different types of summary reports available to you:

- Subunit reports
- Program of study reports
- Reports for particular instructors (“Instructor Profile”)
- Reports that you can put together as you like (“Any Compilation”)

You see these options as soon as you click on the folder (and thus open it):

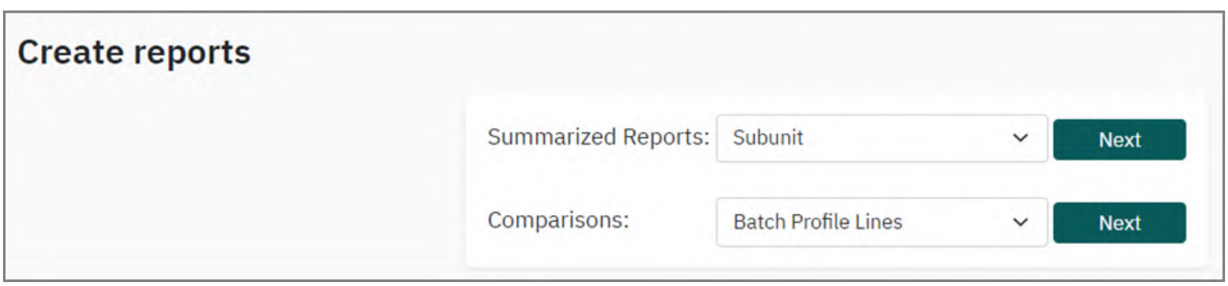


Figure 504: Report Creator: Create Reports

The upper drop-down menu provides a list of all different types of summary reports. The lower drop-down menu allows to access the batch profile lines, which can be used to compare different reports and surveys with each other. The batch profile line dispatch is dealt with in the chapter on summary reports. It is not a type of report.

For the creation of the different reports you must make a selection in several fields. This affects report-specific fields, also for all of them the type of course and the questionnaire must be selected (multiple selection is possible).

Note:
For reasons of search comfort, only the values for which surveys exist in the system are displayed. For example, the subunit “Business Studies” is only then offered for selection if you have already created a survey in this subunit and have scanned data.

Subunit Report

A subunit report is the summary of the survey results for a specific subunit and a specific semester:

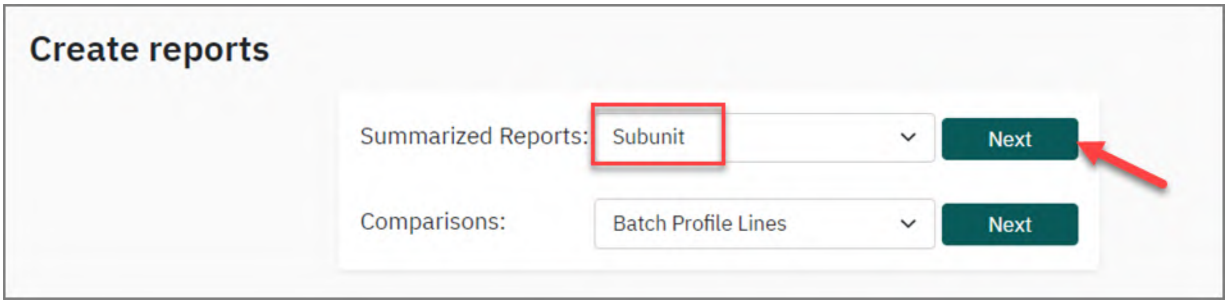


Figure 505: Report Creator: Create Subunit Report

Choose the option “Subunit” from the drop-down list. If you click the button [Next]. Now four fields are presented to you in which you can select a subunit, a survey period, a course type (or even several types) and a questionnaire (or several questionnaires):

In the figure below, the subunit report is created based on one questionnaire. If several questionnaires are displayed for the selection in the list, you can mark these; then, however, you must decide to either go with the automatic text comparison or with the manual assignment, in order to combine the reports.

Give the report a relevant name so that later you are able to relate to what was summarized and make a selection regarding the open questions and the weighting of the surveys that you compile.

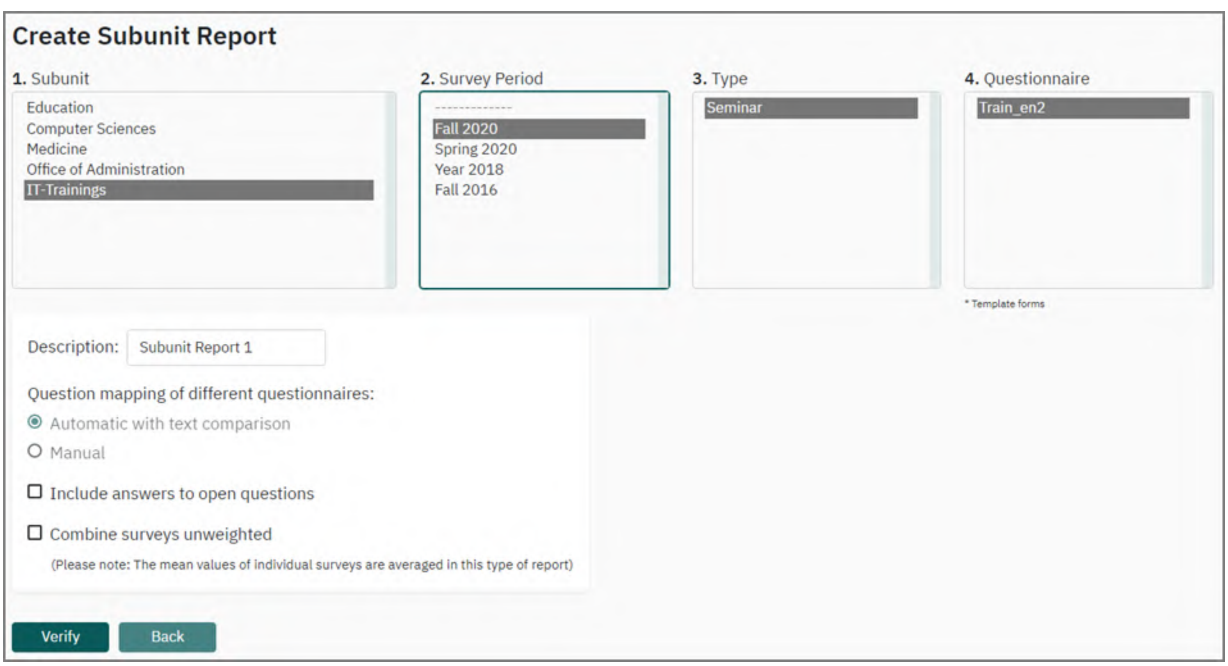


Figure 506: Report Creator: Subunit Report: Selection of Elements and Properties

As soon as you click on [Verify], evasys calculates how many surveys suit your selection. In another window you are again informed of the details of the summary before you actually produce the report:

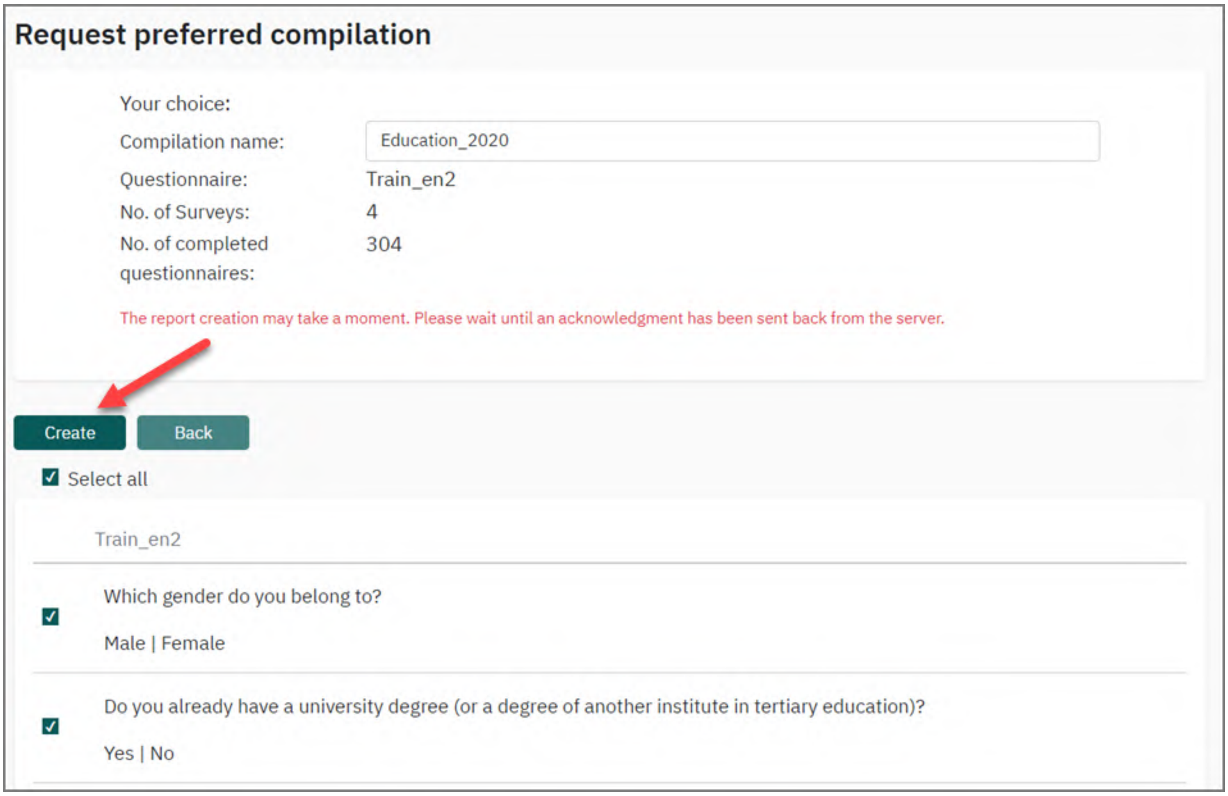


Figure 507: Report Creator: Subunit Report: Final Overview

Here you can check once again which subunit you selected, what the report will be called, and based on which questionnaire it will be created. Furthermore, the selected survey period appears here again with the precise data defined by the administrator. You can see how many surveys meet your selected criteria and to how many return responses it applies (meaning completed questionnaires).

Hint:
If you would like to test the report creator and have only very few surveys running in your system, a warning message may appear here and you do not have the possibility to produce a summary report:

Figure 508: Report Creator: Number of Surveys below the Minimum Number

In this case, please inform your evasys administrator. For testing purposes, s/he can change in the evasys Settings under “System Settings/evasys Settings/Functions/General” the option “Minimum survey number report creator” (by setting it to 0):

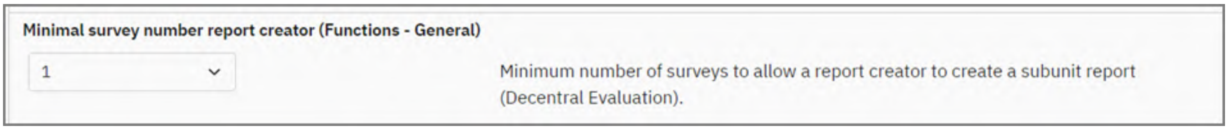


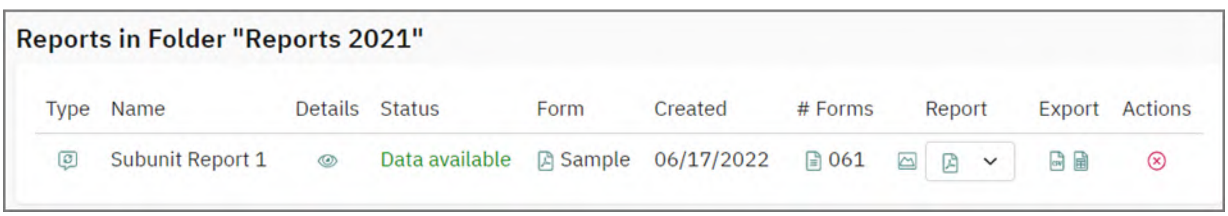
Figure 509: Administrator Login: System Settings/evasys Settings/Functions/General – “Minimal survey number report creator”

This way the message no longer appears and you can create the test reports.

Amongst the general information on the summary report you will find a listing of the questions of the related questionnaire. Here you can deactivate selection boxes as required and thus exclude questions from the summary report. The option “Select all” activates or deactivates all select boxes and thereby allows you to quickly select and deselect a high number of questions.

When all properties are selected correctly, you click on the button [Create] and the report is produced. Please note that depending on the data quantity the processing may take up to several minutes.

After the creation of the subunit report the folder view appears again, the list of the reports is however now complemented with the subunit report:


Reports in Folder "Reports 2021"

Type	Name	Details	Status	Form	Created	# Forms	Report	Export	Actions
	Subunit Report 1		Data available	Sample	06/17/2022	061			

Figure 510: Report Creator: Subunit Report in the Folder

Program of Study Report

In the same way you can produce a summary for a program of study, a particular semester and selected course types and questionnaires.

Just a little reminder: A program of study differs from the usual structure of the subunits and interviewer and/or instructors. Because it is positioned perpendicular to the subunits and allows you to assign courses, that are created in a subunit, additionally to a program of study. So you could for example assign courses of the departments of chemistry and physics (additional) to the program of study “nuclear physics”.

To create a program of study report, choose the option “Program of Study” from the drop-down list and click the button [Next].

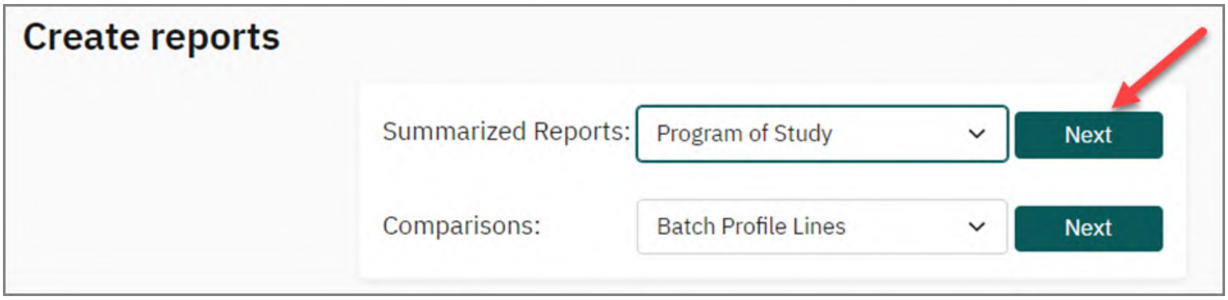


Figure 511: Report Creator: Creating a Program of Study Report

Choose the program of study, the period, the course type as well as the questionnaire in the window that appears. Also the usual options – questionnaire comparison, display of open questions, creation of an unweighted report – are available to you.

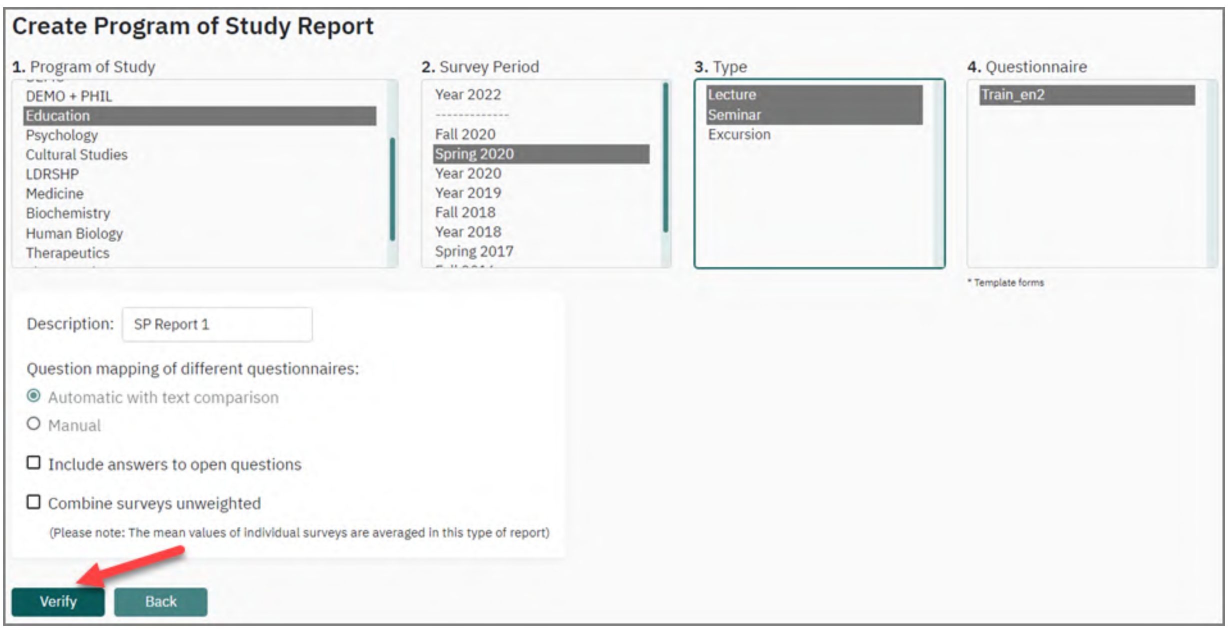


Figure 512: Report Creator: Program of Study Report: Selection of Elements

Except for the selection of the program of study this window largely corresponds to what is presented to you during the creation of a subunit report.

In the same way the information windows resemble one another prior to the actual generation of the report. Here you once again receive detailed information on the report that you create, you can again exclude single questions from the report and create the report via [Create].

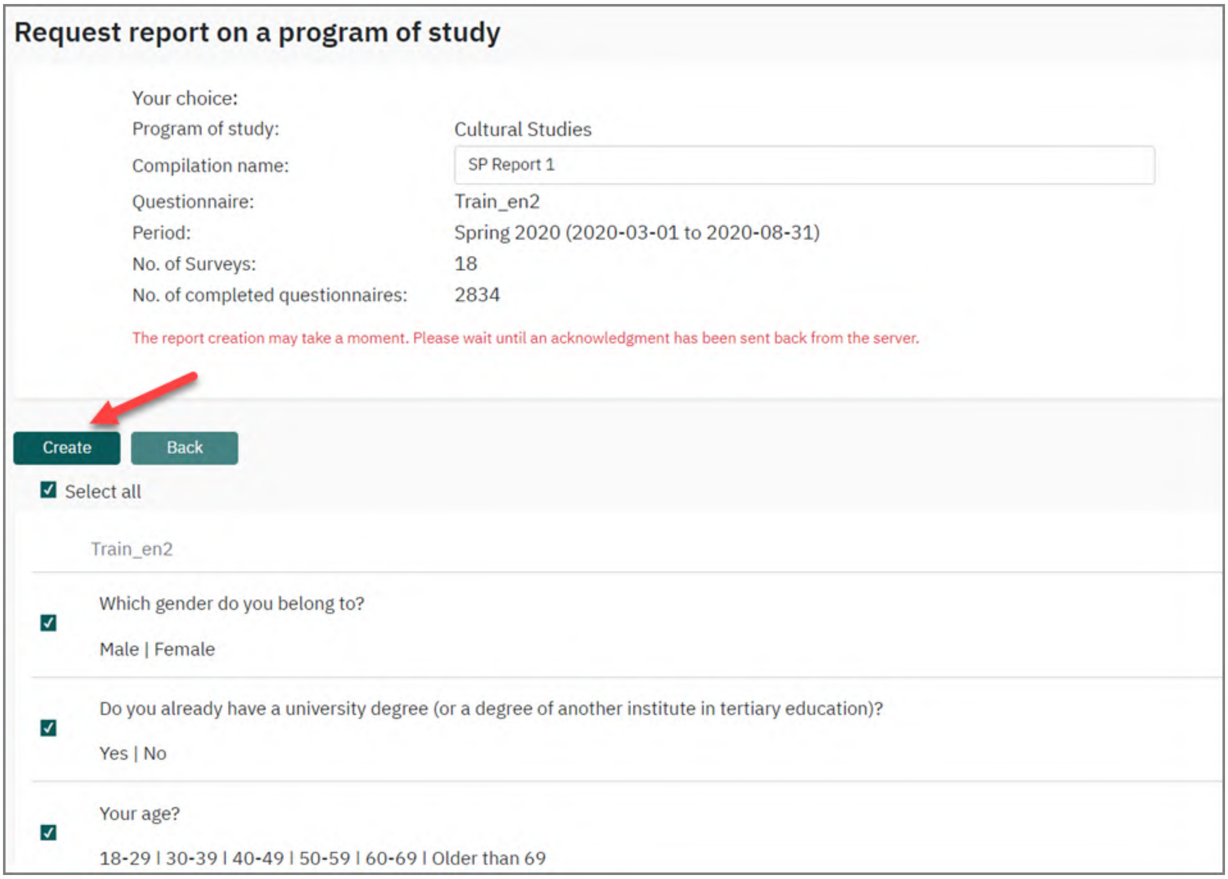


Figure 513: Report Creator: Program of Study Report: Overview of the Selection made and the Questionnaire

Then the report is added to the report list:

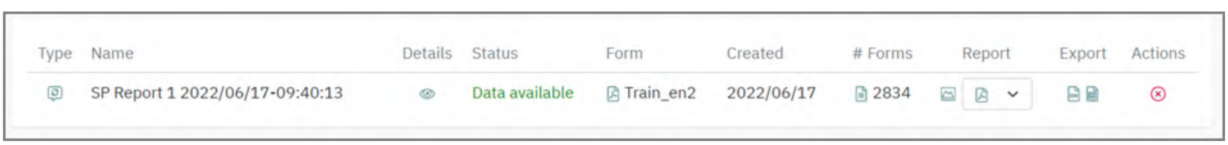


Figure 514: Report Creator: Program of Study Report in the List of Reports

Instructor Profile

The option “Instructor Profile” allows all surveys of an instructor to be periodically summarized into reports. To create an instructor profile, choose the option “Instructor Profile” from the drop-down list and click the button [Next].

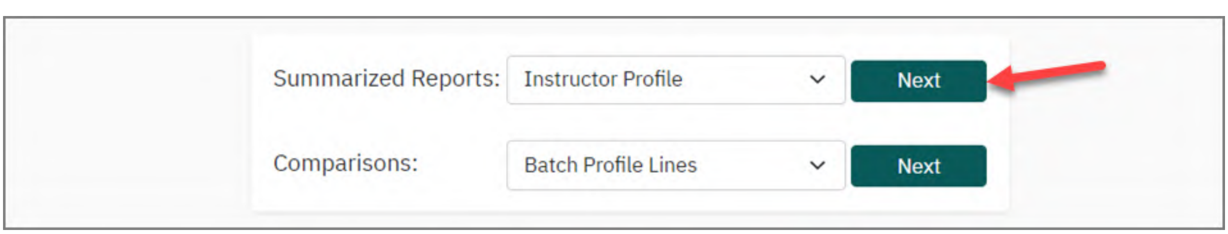


Figure 515: Report Creator: Creating an Instructor Profile

From the instructor list sorted according to subunits, select an instructor and a survey period as well as the required course types and questionnaires. Then you should enter a relevant name (in the example “Prof. Sunny Narrow SS07”), activate the usual options as per your wishes and click on [Verify]:

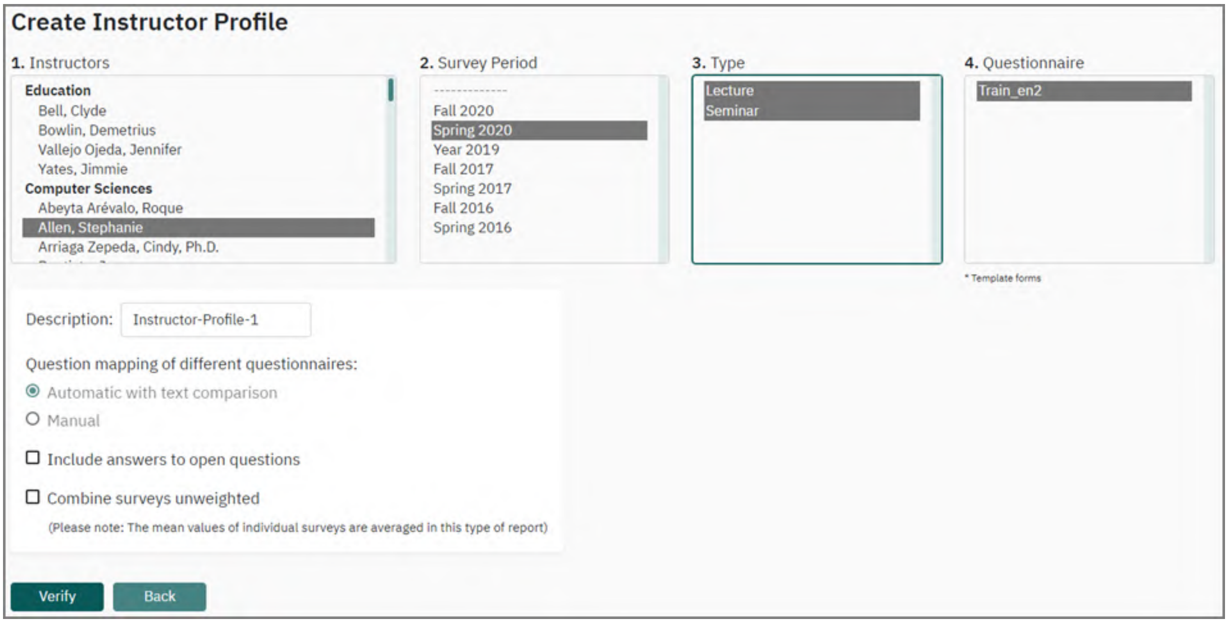


Figure 516: Report Creator: Instructor Profile: Selection of Elements

The window known from other report types opens for the overview of the report that you create:

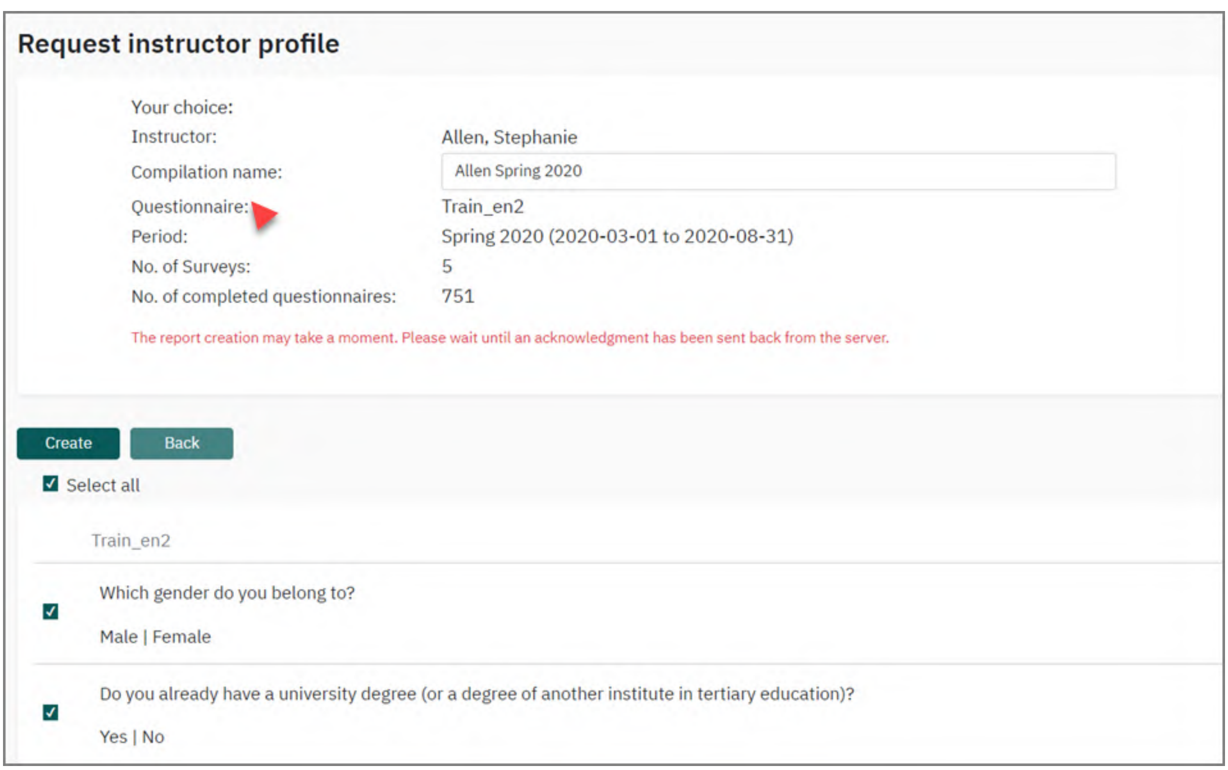
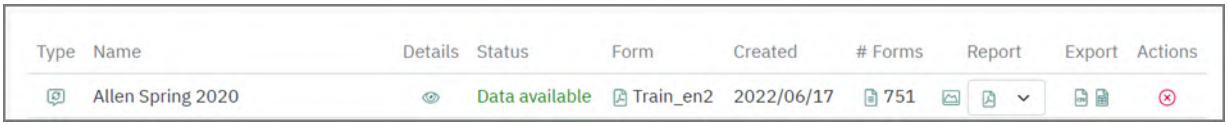


Figure 517: Report Creator: Instructor Profile: Overview of the Selection made and the Ques-

tionnaire

Here you deactivate the questions that you do not need in the instructor report and click on [Create]. In turn, this report also appears in the list:



Type	Name	Details	Status	Form	Created	# Forms	Report	Export	Actions
	Allen Spring 2020		Data available	Train_en2	2022/06/17	751			

Figure 518: Report Creator: Instructor Profile in the Report List

Any Compilation

The option “Any Compilation” is completely flexible, you can freely select which elements you wish to combine. Unlike the other report types it is therefore possible to make a multiple choice in the individual selection fields such as subunit, period, etc.

Example:

You could, for example, summarize the reports for two courses that are held by two different instructors, for example for Donna Harwood the lecture on Web Design, and for Carlos Hernandez on the New Economy. Of course the courses can also belong to completely different subunits.

Or you summarize everything that you have ever evaluated in order to receive an overview of the assessment of your university or your company.

Or you summarize the reports of all courses assigned to the course type “Excursion” in order to receive an overview of the assessment of the study excursions.

These are only a few possibilities – as previously mentioned, in the central evaluation you can freely combine options. For technical reasons, surveys of active users cannot be summarized by means of “Any Compilation”.

To create a report which combines freely definable elements, choose the option “Any Compilation” from the drop-down list and click the button [Next].

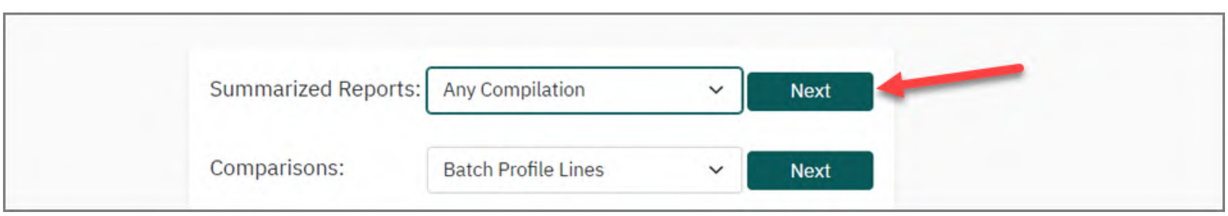


Figure 519: Report Creator: Create Any Compilation

The window which then opens offers you the usual selection. Here you can mark several elements by simultaneously pressing with the mouse and the [Ctrl]-key. In the following example a “Report of train_en” is produced, which is a summary of all surveys that have been conducted so far. The questionnaires “train_en” and “train_en1” do not differ considerably from one another and are, therefore, suitable for such a compilation:

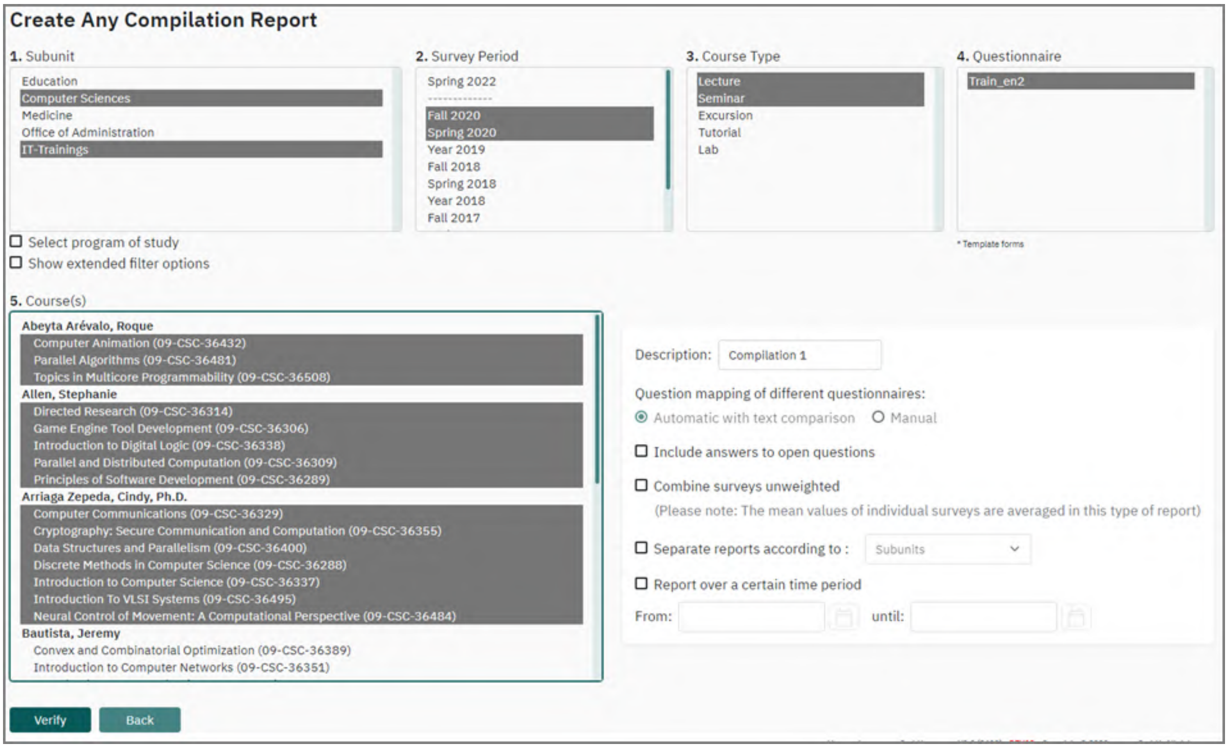


Figure 520: Report Creator: Any Compilation: Selection of Elements

If you wish to additionally filter the courses according to programs of study activate the option “Select program of study”. In addition to the existing selection fields (subunit, survey period, course type, questionnaire and course(s), the field “Program of study” appears in third place. In this field you can select one or several programs of study:

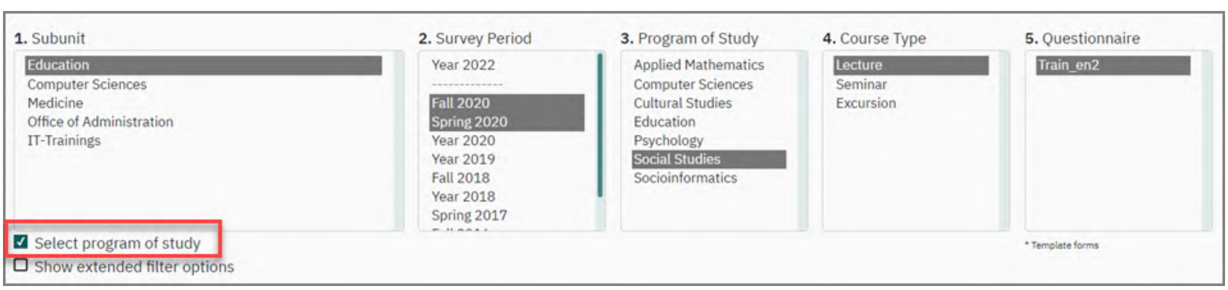


Figure 521: Report Creator: Any Compilation: Selecting the Program of Study

When you click on [Verify] after selecting the elements, a small overview of the questionnaire is provided – or, if there are several questionnaires as in this case, an overview with a questionnaire comparison is provided:

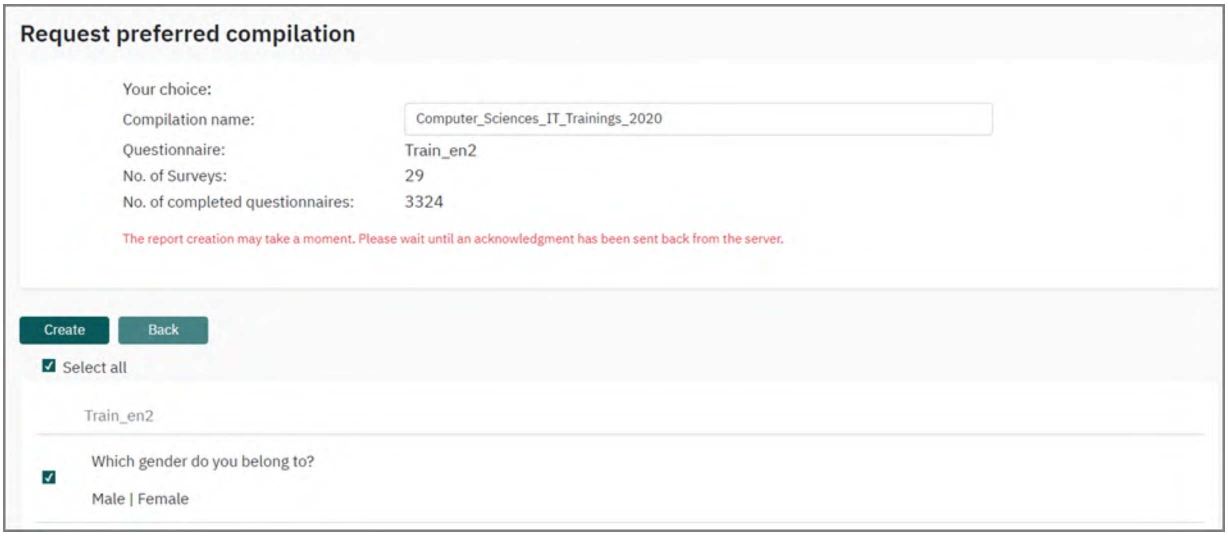


Figure 522: Report Creator: Any Compilation: Overview over the Selection made and the Questionnaire

Click on [Create] (or first assign the questions correctly). Also this report then appears in the list:

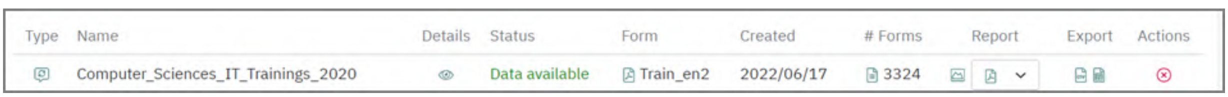


Figure 523: Report Creator: Any Compilation in the Report List

Further Options for Any Compilation Reports

Any compilation reports, as opposed to other types of reports, offer a range of further options by which data can be filtered and reports created.

Filter for Data Fields of Courses and Participants

In addition to the selection criteria already described, in the user defined compilation there is the possibility to filter courses by, for example, location, course ID or up to 20 additional data fields. Particularly the user data fields enable user defined filtering criteria and as such, to filter and create reports individually as required. To create additional course fields please see chapter B 2.1.5. "Creating Courses"

To show the filtering possibilities of course properties, activate the option “Show extended filter options”:

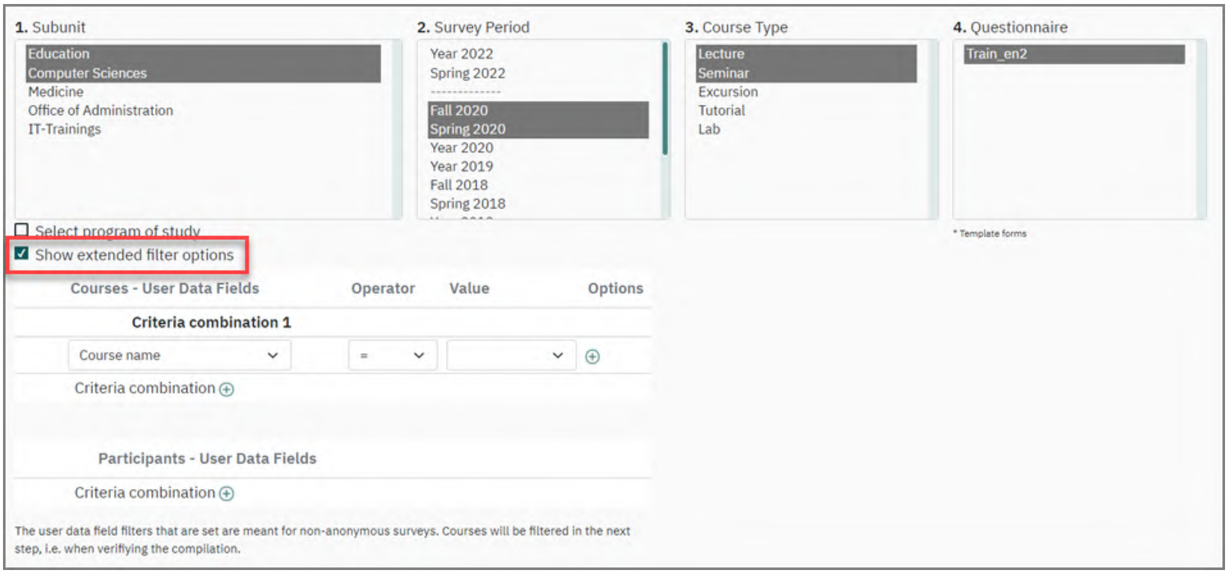


Figure 524: Report Creator: Extended Filter Options

Two filter areas are displayed. The top area can be used for filtering according to course information. Click the plus symbol in order to create a filter. Select a filter criterion from the left drop-down menu. It can be filtered according to the following criterion (multiple selection possible):

Criteria	Search type
Name	Simple text search
Identification	Simple text search
Room	Simple text search
Participant	Smaller, equal or larger of particular number
Secondary instructor	Selection: Available/Not available
Additional course user data fields (if defined up to 20 items)	Selection dependent on defined values

Table 18: Filter criteria for “Any compilations”

Select a pre-defined value in the “Value” column, or enter a value in the selection field. Then click the plus sign in the “Options” column to use the filter. The course/topic list underneath is now filtered according to the selected criterion.

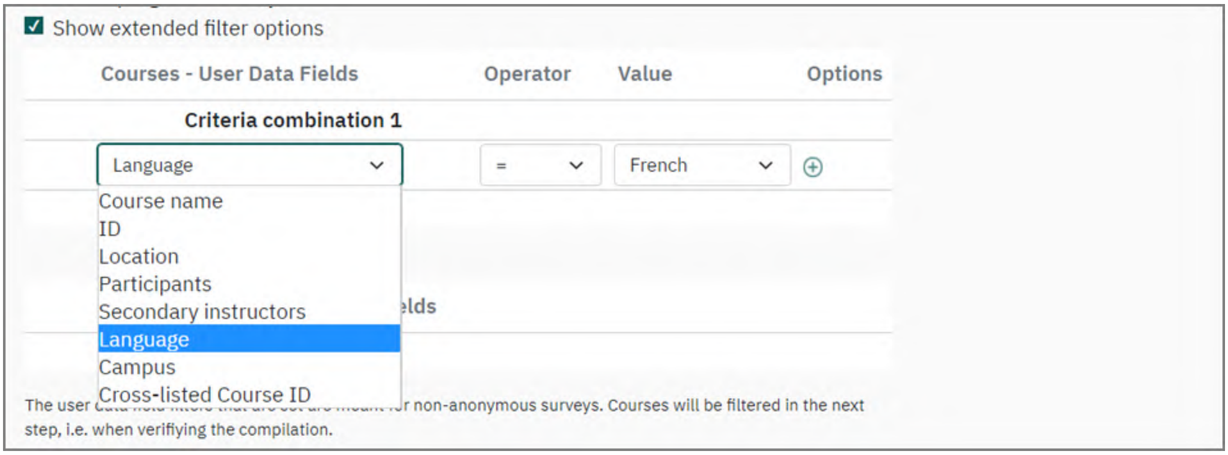


Figure 525: Filtering according to user data fields for courses

If desired, you can add further filters to the criterion combination. For this, select again a field and a value, and click the plus symbol. The two criteria are automatically connected with the “AND” operator. You can also change this to “OR”.

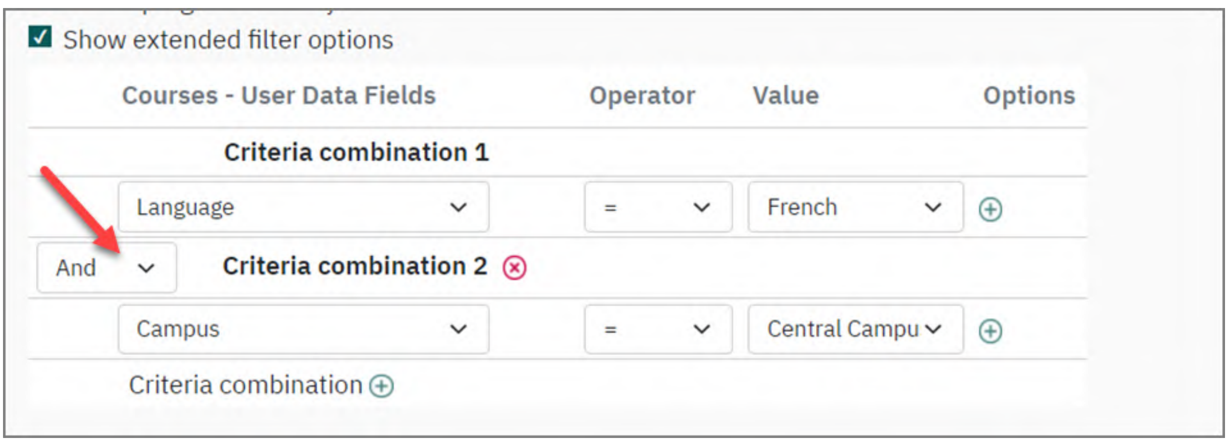


Figure 526: Two linked filter criteria

You also have the option of creating further criterion combinations, which in turn are linked via Boolean operators.

Note:
Please note that a criterion can only be used after you have added it to the right column via the plus sign. You recognize an added criterion by the red cross displayed in the “Options” column.

Filtering according to participant data works the same way as filtering according to course data described above. Here as well, up to 20 participant data fields are available for filtering purposes, provided they are defined in advance. Of course both filters can also be used in combination.

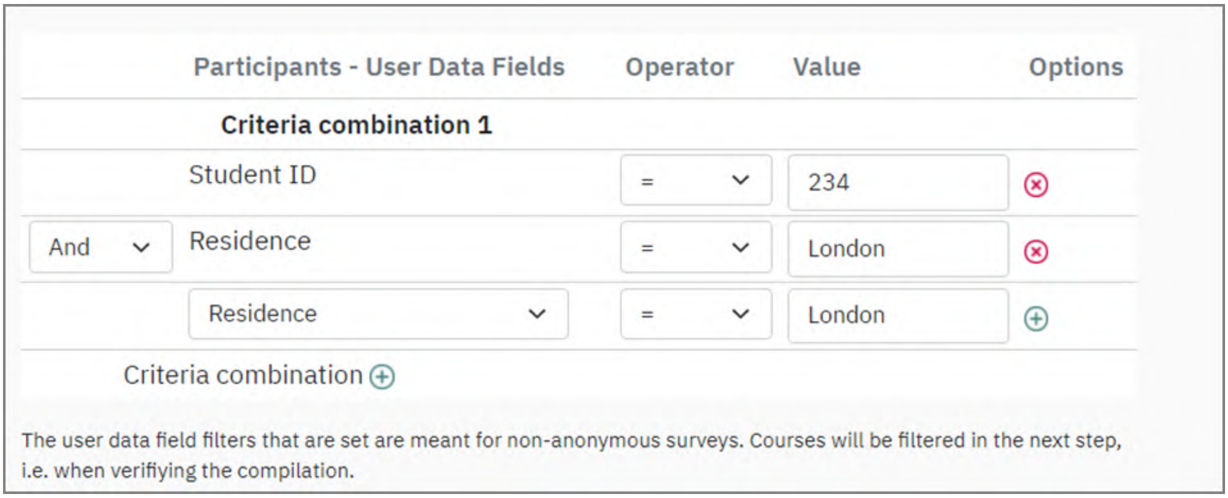


Figure 527: Filtering according to user data fields for participants

Please note that only the data from non-anonymous surveys can be filtered according to participant information. With anonymous surveys, no participant data is available for filtering.

Please also note that the list of courses is not immediately filtered as soon as you have selected and added a participant criterion. This is not possible as under certain circumstances only individual participants are filtered out of the courses/topics. Therefore filtering only happens when the report data is compiled, i.e., after you have clicked [Verify]. The filter criterion is displayed to you again as an overview on the next page.

Tip:
The set filters can be displayed in the PDF report if desired. If this is not activated by default, you can activate the display in the details of the report via the option “Show report sources & filter settings in the report”. For further information, see chapter B 5.2.7. "Information on a Report: Detailed View"

Batch Creation of Reports

In the Any Compilation Report it is possible to create reports in batches according to specific filters. If, for example, a summary report on every course from a certain period is to be generated, this can be done with the help of the option “Separate reports according to” and a simple click.

When creating the report, select in the report options the criteria by which you would like to separate the reports. Apart from the separation by type of course, there are several options available in the drop down menu such as subunits, period, program of study, questionnaire as well as the course user data fields.

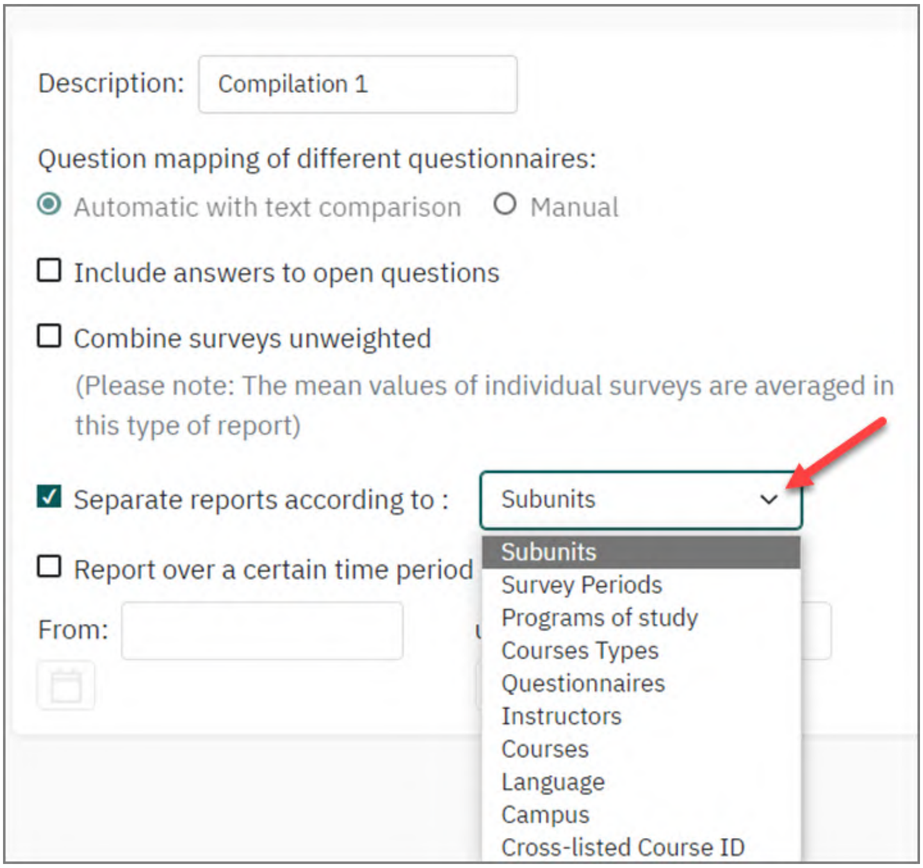


Figure 528: User Defined Compilation: Batch Creation of Reports

After clicking [Verify] an overview of the reports to be created is displayed. Click on [Create] to create the reports.

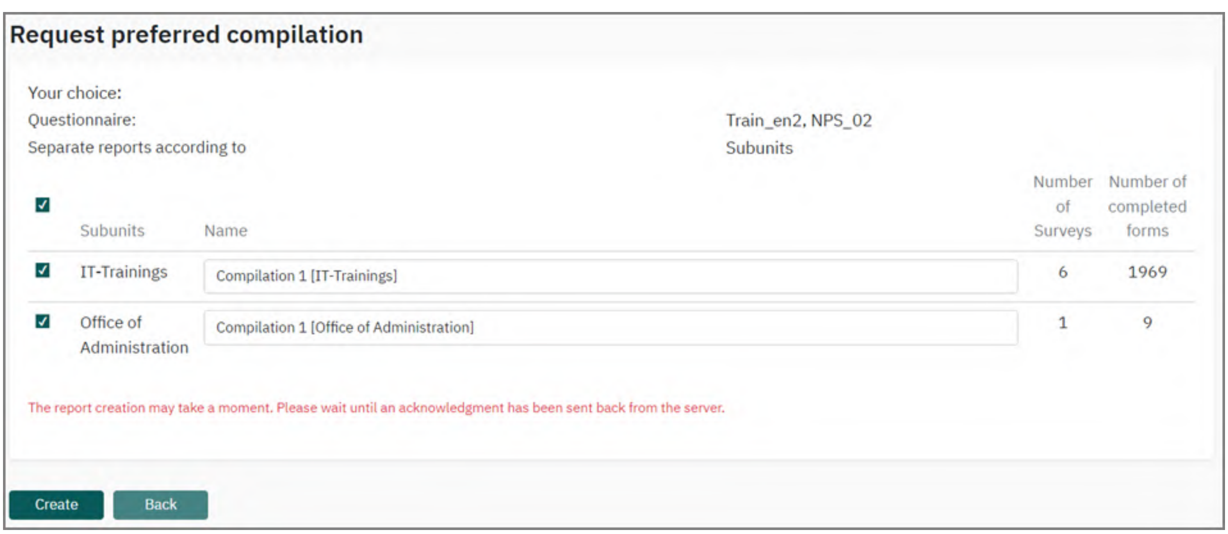


Figure 529: Report Creator: Overview of Batch Creation

- **Creating Reports Over a Freely Definable Period**

If desired, with the Any Compilation Reports, reports can be generated for a defined period of time. In this way it is possible to deviate from the predefined monitoring periods and to define your own periods for the evaluation of data, for example to create monthly reports, even though the data is captured on a semester based time-line.

To do this, activate the option “Report over a certain time period” and using the calendar set the start and end date of the desired period.

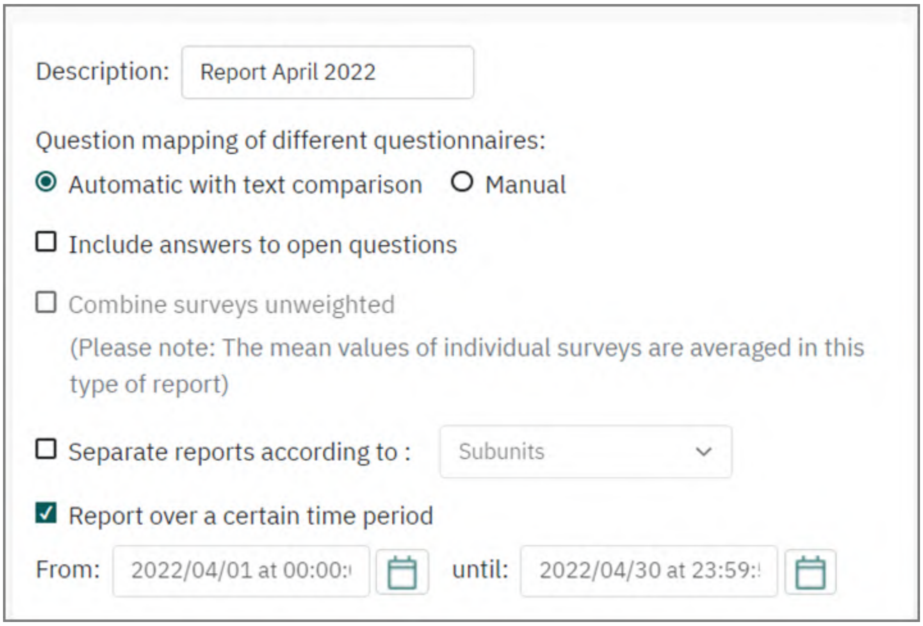


Figure 530: Report Creator: Create a Report for a Specific Time Period

For the selected period of time, all data which was captured within this period is accumulated. For paper based surveys, the scan date is relevant, for online surveys, the date when the participant submitted the questionnaire.

Any Compilation: Tree Structure

When creating an ‘Any Compilation’ report, surveys can also be selected with the help of a tree structure. By this, the hierarchical order of the different organizational levels (e.g. subunit, location, program of study, instructor etc.) is better visualized and the desired surveys can be selected more easily.

Choose the option “Any Compilation (Tree Structure)” from the drop-down list and click the button [Next].

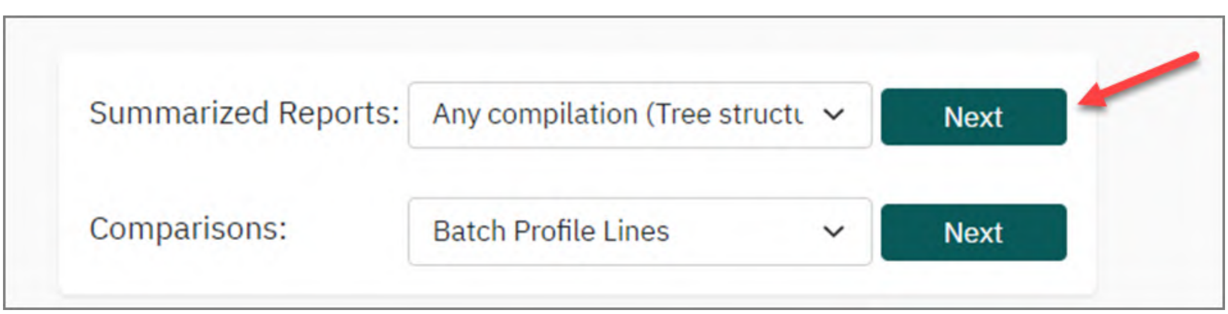


Figure 531: Report Creator: Create Any Compilation (Tree Structure)

In the left section of the next window the tree is displayed. The single levels of the tree can be opened or closed by clicking the + / - symbols or clicking on the name of the level. All levels the administrator has selected for the organizational structure are shown in the predefined order. By marking the boxes single levels can be selected. For further information on working with the tree structure please see chapter B 3.19. “Tree Structure”.

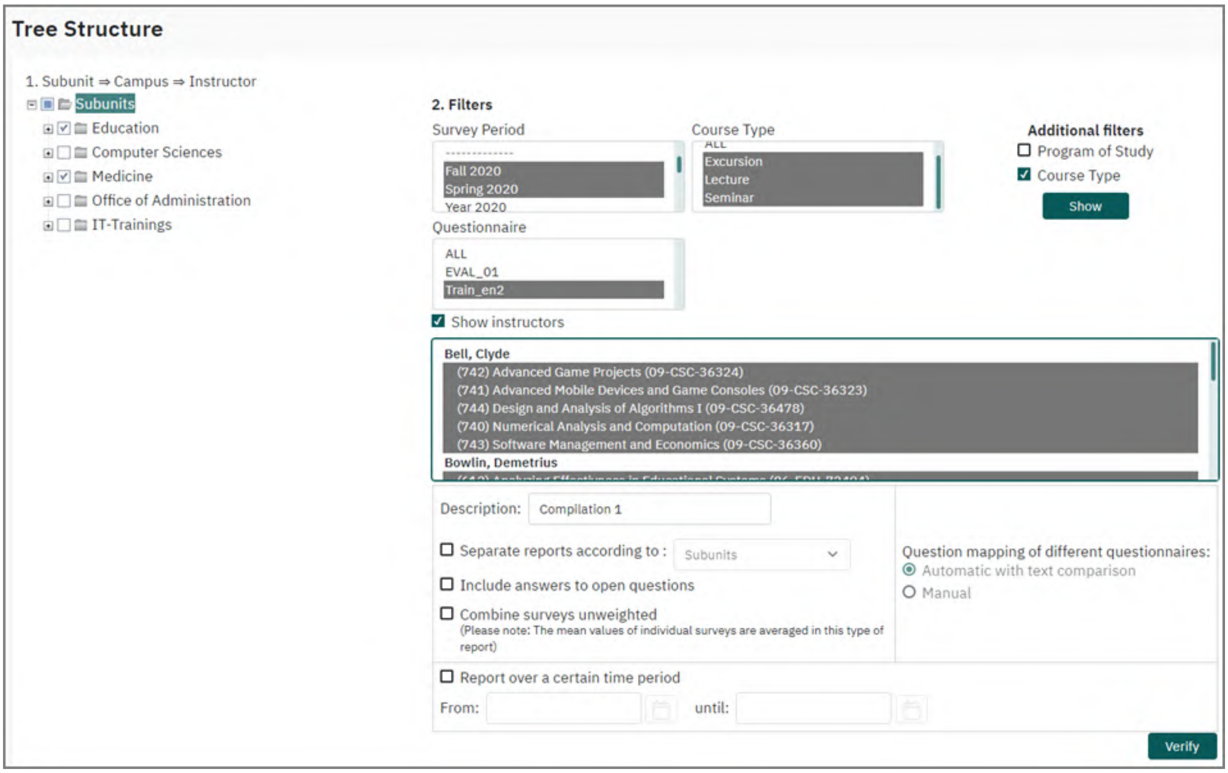


Figure 532: Report Creator: Any Compilation (Tree Structure): Select Surveys

Choose the desired elements from the tree and use the additional filters to select the evaluation periods, course types and questionnaires. Then click the button [Show]. Now in the survey list below the surveys will be displayed which correspond to the filter settings. Choose the desired surveys from the list.

Then enter a name for the report and, if necessary, do some further settings (such as text comparison etc.). Click the button [Verify]. The questionnaire will be displayed in an overview. Click on [Create] to finally create the report.

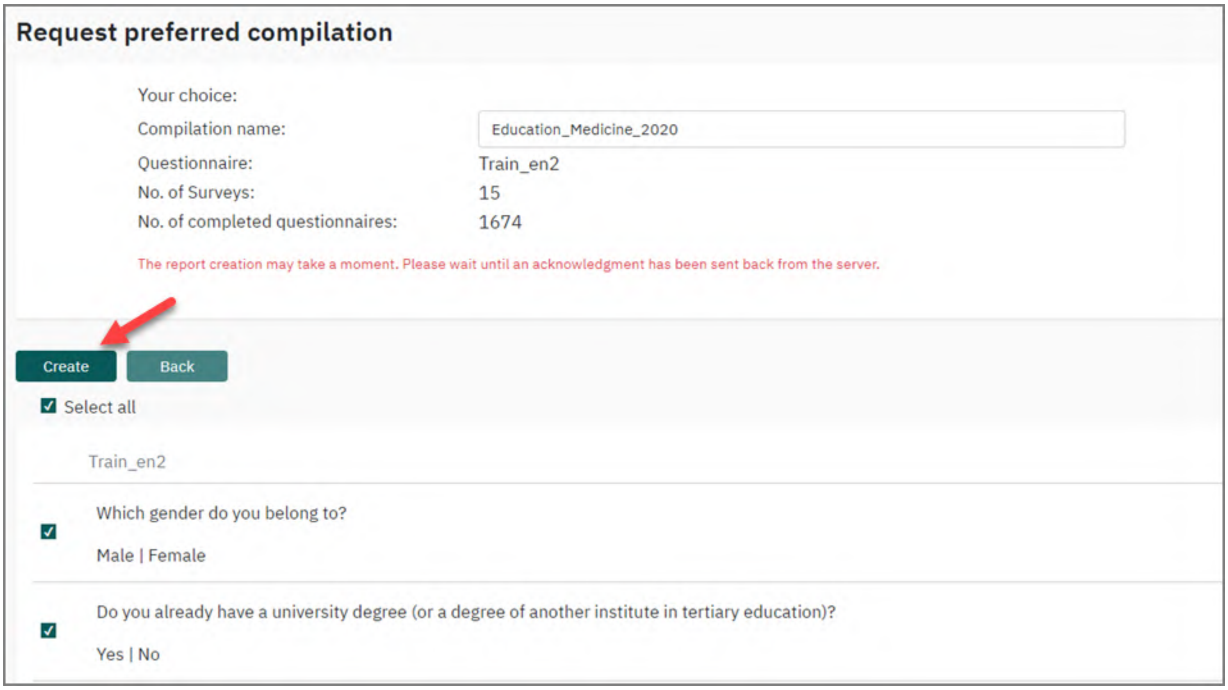


Figure 533: Report Creator: Any Compilation (Tree Structure): Questionnaire Overview

The report will be created and is shown, as all other reports, in the list within the folder.

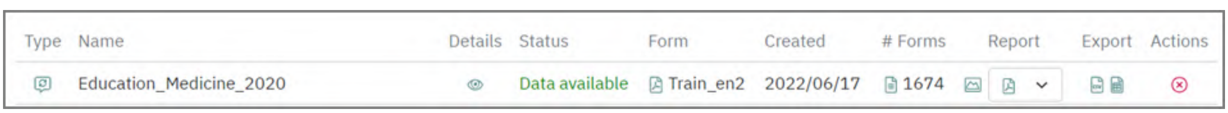


Figure 534: Report Creator: Any Compilation (Tree Structure): Report in the List of Reports

5.2.5. Combinations and Subgroups

The previous chapters show that the report creator allows the generation of reports according to very flexible criteria. So far, however, only the compilation of data according to specific criteria was explained. How to summarize these compiled reports again or evaluate the reports according to different criteria is the topic of the following chapter.

For these two needs mentioned – the combining as well as the taking apart of existing reports – there are two options in the details of a report. Just a small reminder: You will find the details of a report by clicking on the name of this report in the report list.

Combining Reports

First of all, the combinations are dealt with here. This option enables you to summarize several created reports. If you go to the details of a created report you see at the bottom right the second to last point “Merge evaluations”:

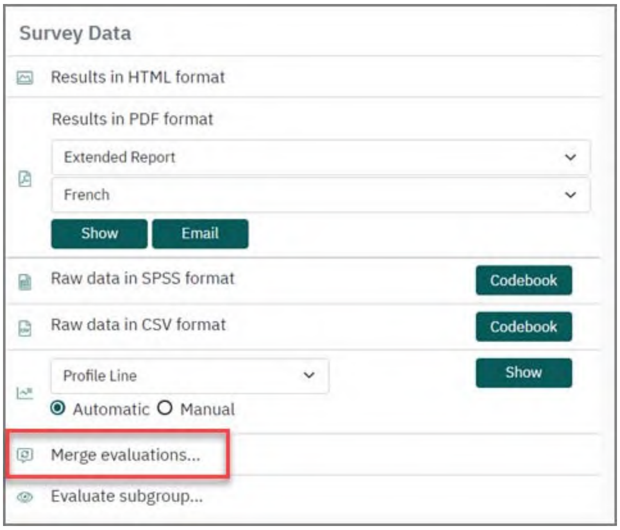


Figure 535: Report Creator: Report Details: Merge Evaluations

If you wish to summarize several reports click on this option. A new window appears in which you can mark all reports that you wish to combine with the current report.

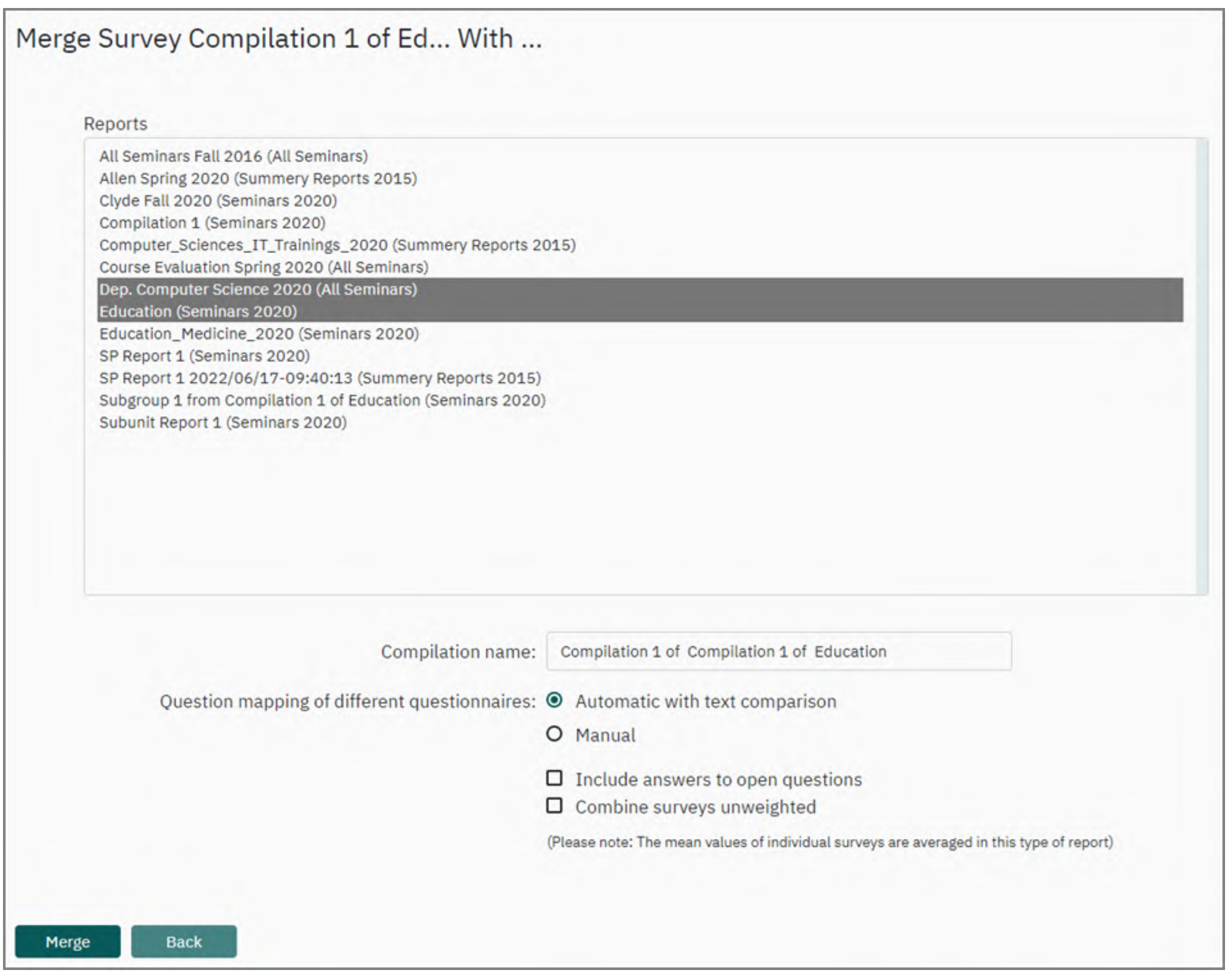


Figure 536: Report Creator: Merge Evaluations - Selection of Reports

Since these are combinations, too, the usual options are available to you (questionnaire comparison, inclusion of responses to open questions as well as the unweighted combination). Choose the options that you wish here and click on [Merge]. Then a new report is added to your report list, the combination of reports you chose:

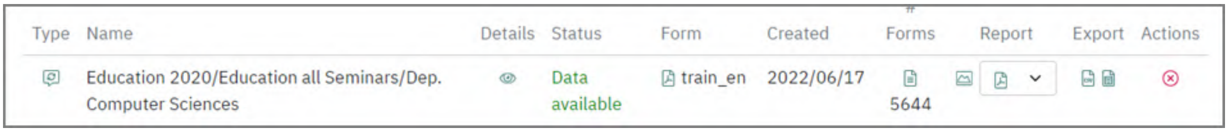


Figure 537: Report Creator: Merged Reports

The properties of these merged reports correspond exactly to those of the other, existing ones. Here you also obtain the information through the details in the list or through a click on the name. There you have the option to merge further reports.

Forming Subgroups

Not only can you merge existing reports with others, but you can also form subgroups from all reports created, meaning the reports can be evaluated according to certain criteria (age, gender, subject etc.).

These criteria are specific groups of returns (meaning completed questionnaires) and these you determine yourself – through the creation of your questionnaire. You can form these groups according to your

- single choice questions,
- multiple choice questions and
- scaled questions.

Example:

Your questionnaire contains a single choice question regarding the gender with the answers “female” and “male”. You can then create for all summarized reports each a subgroup report “Female” and “Male” based on this questionnaire. These reports could give you information on whether women and men answered differently.

Your questionnaire contains a single choice question regarding the age – e.g. you ask for the groups of those aged 18 to 29, for the students aged 30 to 39, those aged 40 to 49 etc. If you evaluate reports – which are based on this questionnaire – according to subgroups, this age question is presented to you as a criterion. Then you could, for example, create a subgroup report for all mentioned age brackets and compare the results. Following this, it would also be possible to combine the reports for the first three groups and for the last three groups and thus compare the age group of 18 to 49 with the age group 50 and over.

Your questionnaire contains a multiple choice question (or a single choice question) on the subject with the responses “Geology”, “Chemistry”, “Physics”, “History” and so forth. Then you can create corresponding subgroup reports for all summarized reports based on this questionnaire: subgroup report “Geology”, subgroup report “Chemistry” and so forth. This way, you can structure courses that are attended by students of various disciplines according to subjects and make the results (meaning the subgroup reports) available to those in charge of each discipline. It could, for example, be that *the dean of “Chemistry” is not interested how the course “Nuclear Physics” was generally assessed as it belongs to the field of “Physics”. How the Chemistry students assess the course could, however, be of great interest to him.*

If your questionnaire contains a single choice question regarding the grade level, you can then evaluate subgroups regarding the grade level.

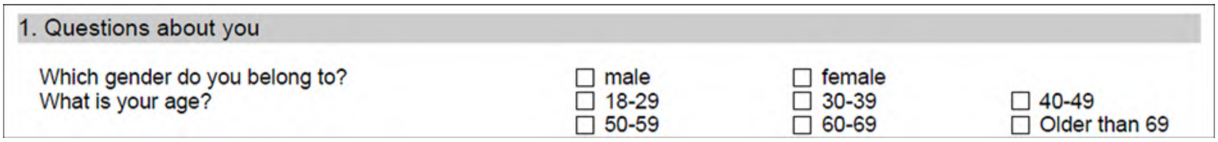


Figure 538: Report Creator – Single Choice Question Regarding a Respondent’s Age

In order to produce a subgroup report, click in the details of a report on “Evaluate subgroup” (the last option on the bottom-right):

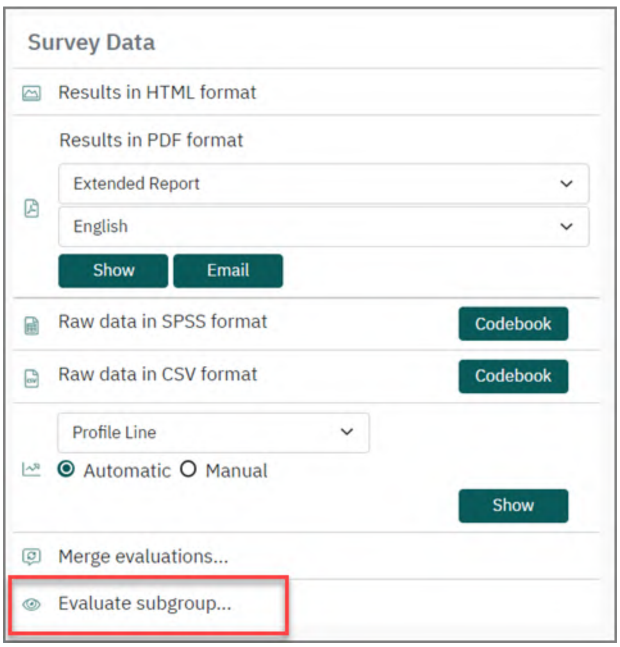


Figure 539: Report Creator: Report Details: Evaluate Subgroup

In turn, another window opens that presents you with all possible types of questions on which you can evaluate subgroups:

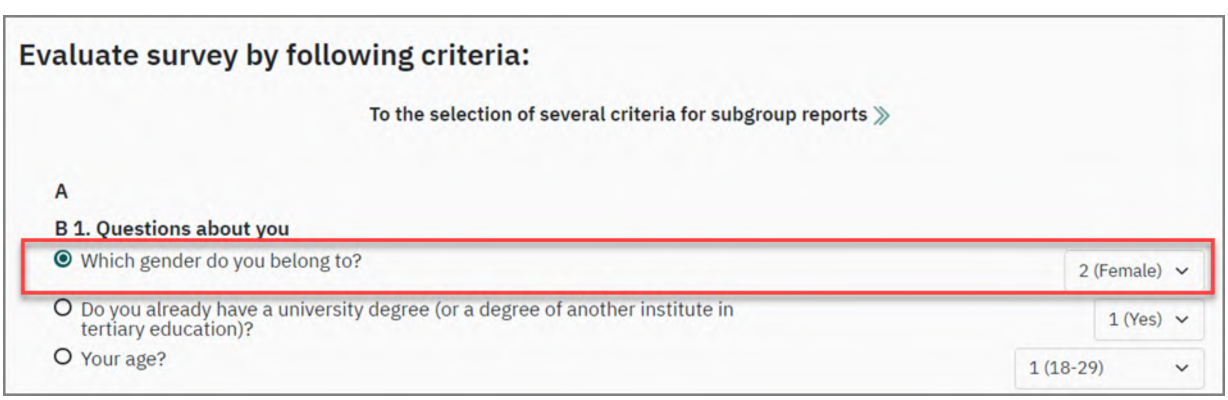
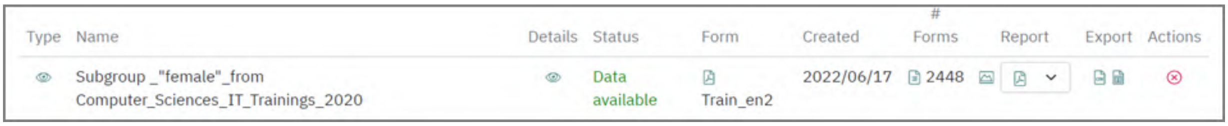


Figure 540: Report Creator: Evaluate Subgroup: Selection of a Criterion

In order to create a subgroup report, here you choose a criterion (that is a question), for example the gender, and a value for the criterion (meaning the corresponding response option to the question), here for example “Male”. Then you assign a relevant name, decide for or against the inclusion of the open questions in the subgroup report and click on the button [Create]. The subgroup report now appears in the list of reports:



Type	Name	Details	Status	Form	Created	# Forms	Report	Export	Actions
	Subgroup _"female"_from Computer_Sciences_IT_Trainings_2020		Data available	Train_en2	2022/06/17	2448			

Figure 541: Report Creator: Subgroup Report in the Report List

Please note: Subgroup reports are identified by a logo different from that of the other reports, the remaining options are, however, identical.

So you could again create, for example, subgroups from this report (for example grade level) and/or merge this report with further evaluations.

Combining Multiple Criteria

In order to summarize the results of different criteria, such as “Gender”, “Registered Major Subject” and “Target Degree”, in a subgroup report, you can use criteria combinations. These offer you the possibility of creating a subgroup report with several criteria (i.e. with multiple questions).

To create a subgroup report with several criteria, click, as you are accustomed, in the details of a report on “Evaluate subgroup” (the last option on the bottom right). Subsequently a Window opens, offering you all possible questions with which you can evaluate a subgroup. In this window, you can click on the link “Choose several criteria for subgroup reports“. This allows you to select multiple criteria for your subgroup report.

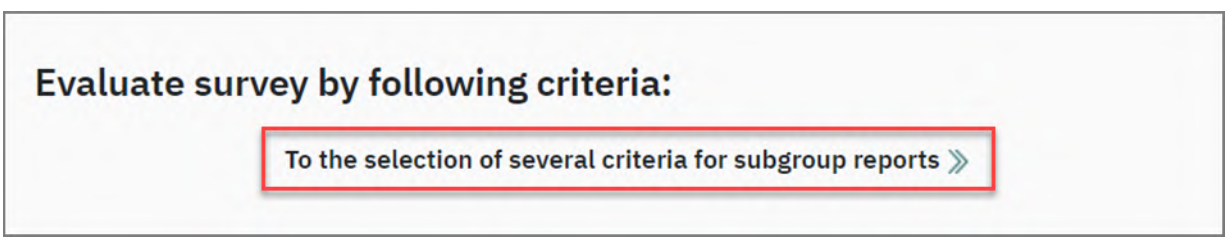


Figure 542: Report Creator: Selection of Several Criteria for Subgroup Reports

The following window opens:

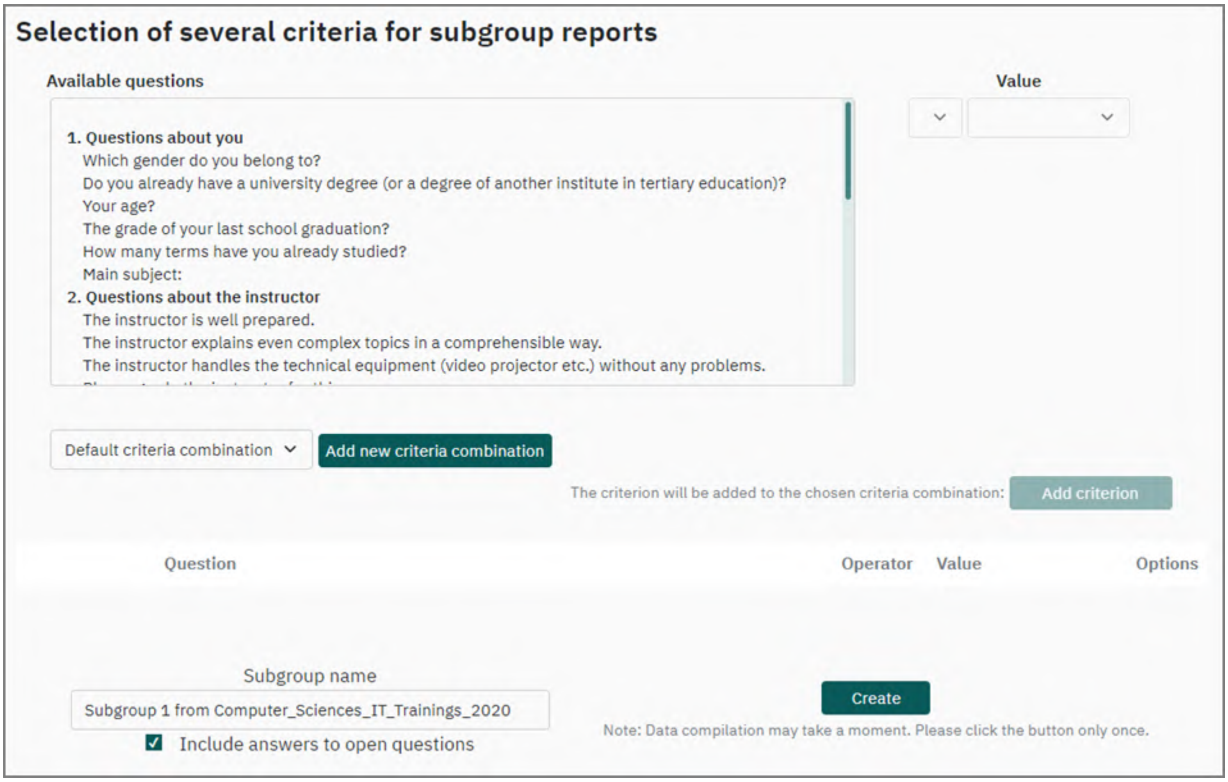


Figure 543: Report Creator: Selection of Several Criteria (Questions) for Subgroup Reports

In this window, for example, you can select interviewees who belong to a specific age group as the first criteria. To do this, click in the area “Available questions” on the criteria “Age. Choose, on the right hand side the value of the criterion, i.e. the desired answer for this question. In this example, the option “18-29” was selected:

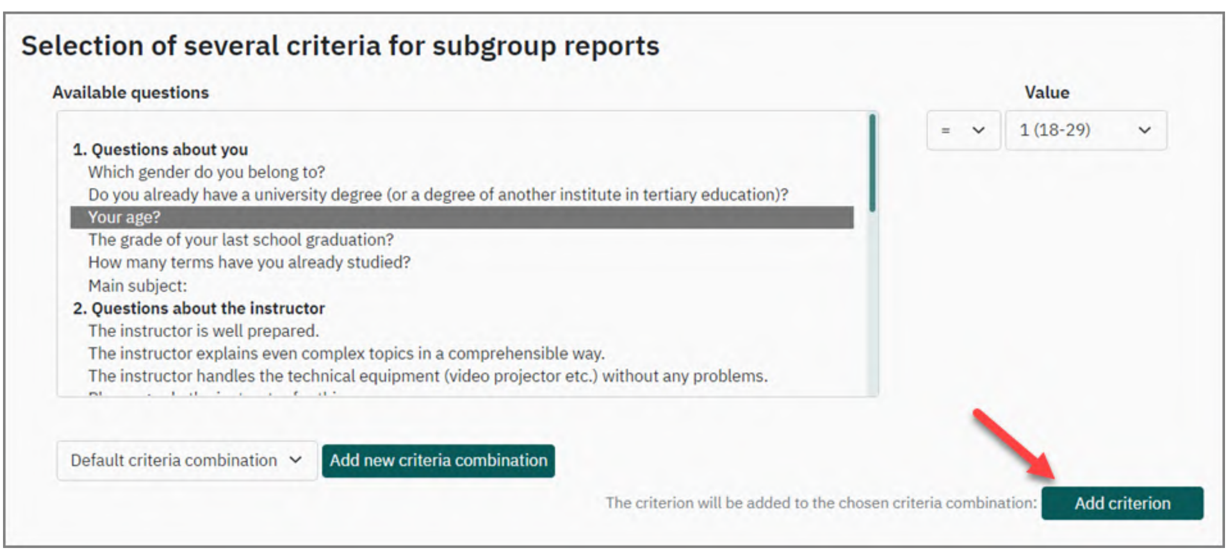


Figure 544: Report Creator: Selecting the First Criterion “18-29” for the Subgroup Report

Finally, click on the button [Add criterion]. The criterion then appears in your “Default criteria combination“.

In this case, the criterion “Age” with the value “18-29” was added. The condition being, that exactly this value must be fulfilled (indicated by the “=” character in the “Operator” column):

Figure 545: Report Creator: Criterion “18-29” was Successfully Selected

Depending on which question type the selected question is related to, you can select a “=” operator, or other operators. With regard to scaled questions and matrix questions, as well as the “=” operator, the “<”, “>”, “≤” and “≥” and “<>” (unequal) are available.

In open questions, you can filter by strings contained or not contained, as long as the data of the open question is not an image. This function then applies to online surveys or paper surveys with data collection and ICR.

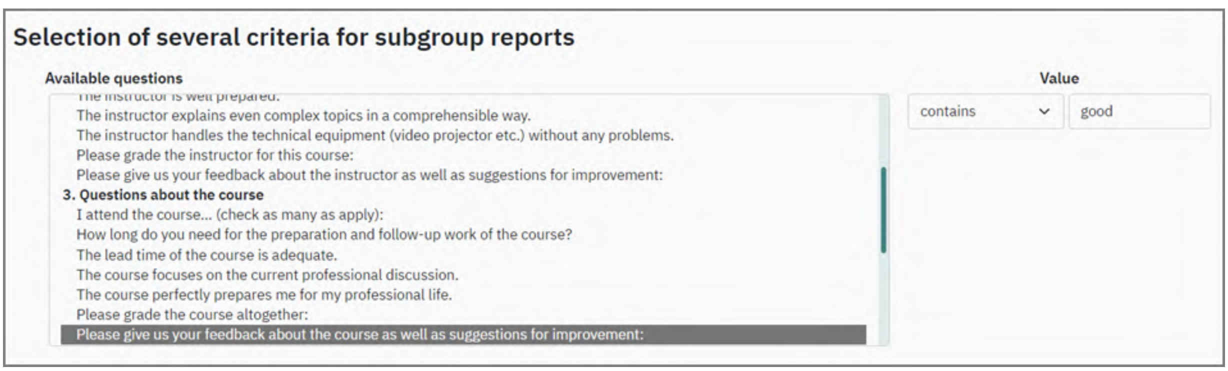


Figure 546: Report Creator: Filter options for open questions

You can change the value of a criterion at any time here. This means, you can select, for example, all interviewees aged 30-39 instead of 18-29. To do this, click on the arrow of the drop-down menu for the value of your chosen question.

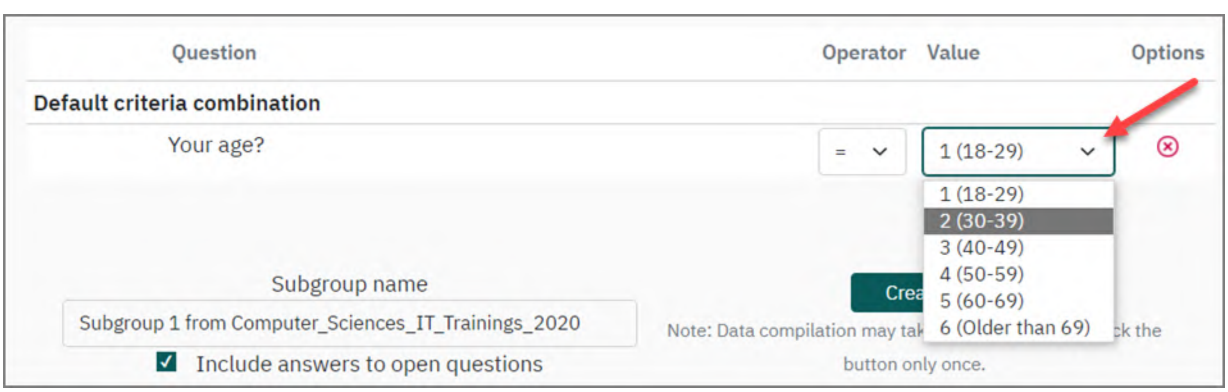


Figure 547: Report Creator: Changing Criteria

Furthermore, you can delete a selected criterion at any time, by clicking under “Options” on the red cross.

You can also create a subgroup report for all interviewees aged 18-29 via a simple subgroup, you do not need a criteria combination to do this. You can however combine this criteria with others, for example with the main subject. In this way, you can create a subgroup report for all interviewees between 18-29 who have the main subject “Business Studies”.

As described above, first select the criterion “Age” with the value “18-29”. In a second step, select the criterion “Main Subject” with the value “Business Studies”. Your “Default criteria combination” now contains two criteria:

Figure 548: Report Creator: Criteria Combination of all Interviewees between 18-29 with main subject “Business Studies”

In this example, you wanted to consolidate all students aged 18-29 with the main subject “Business Studies” in your subgroup report. This means, that both conditions must be met at the same time (i.e. the student is between 18-29 years old AND s/he studies Business). For this reason, both of the selected criteria are connected with the logical operator “And” (for computer scientists amongst you, you can select the Booleschen operators here).

On the other hand, if you want to create a subgroup report containing the results of all interviewees, who are either between 18-29 years old OR study Business, select here the “Or” operator. Your subgroup report would then contain the results of all students between the age of 18-29 – as well as the results of all other students who have the main subject “Business Studies”. This means, that this subgroup report also contains the results of students belonging to other age groups who study Business.

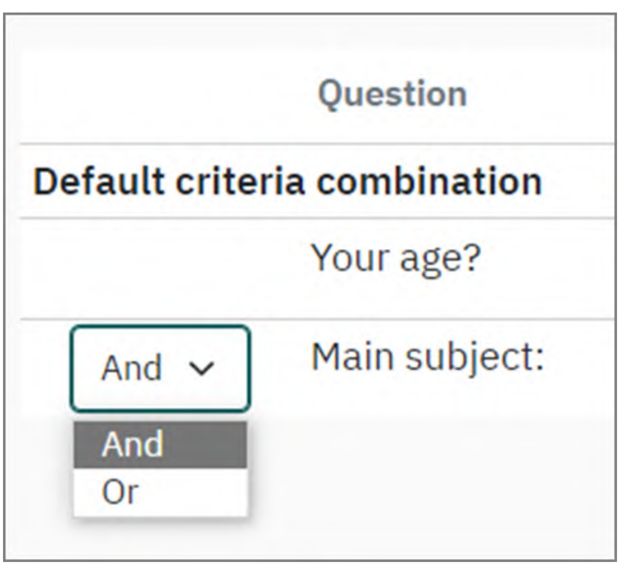


Figure 549: Report Creator: Two Criteria with the Operator “Or”

Finally, as you are accustomed, allocate a descriptive name, decide for or against including open questions in the subgroup report and click on the [Create] button. The subgroup report now appears in the list of reports:

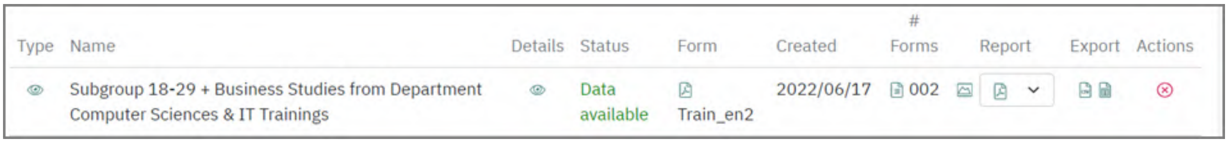


Figure 550: Report Creator: New Subgroup Report in the Report List

You also have the possibility of creating several criteria combinations. If, for example, you wish to summarize the results of all female students who have the main subject “Business Studies” or the results of all students between 18 and 29 who have the main subject “Business Studies”, proceed as follows.

In the default criteria combination, as you are accustomed, set the criteria to “female” and “Business Studies”. Then click on the button [Add new criteria combination] to create a second group.

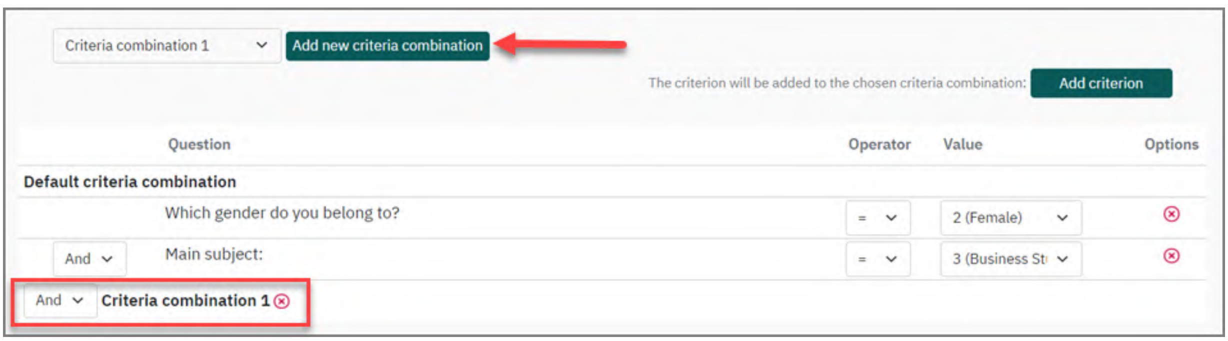


Figure 551: Report Creator: Add new Criteria Combination

This second group automatically receives the name “Criteria combination 1”. Add the criteria “Age” (with the value “18-29”) and “Main Subject” (with the value “Business Studies”) to this criteria combination.

Figure 552: Report Creator: Two Criteria Combinations

Imagine you only want to see in your report the results of those interviewees who fulfill the following conditions: the interviewee is either female OR between 18-29 and in both cases has the main subject “Business Studies”. For this reason, link both criteria combinations with the “Or” operator.

Finally, as you are now familiar, allocate a descriptive name, decide for or against including open questions in the subgroup report and click on the [Create] button. The subgroup report now appears in the list of reports.

When you have created several criteria combinations, using the drop-down menu, you can select the criteria combination to which the criteria combination of the chosen question is to be added.

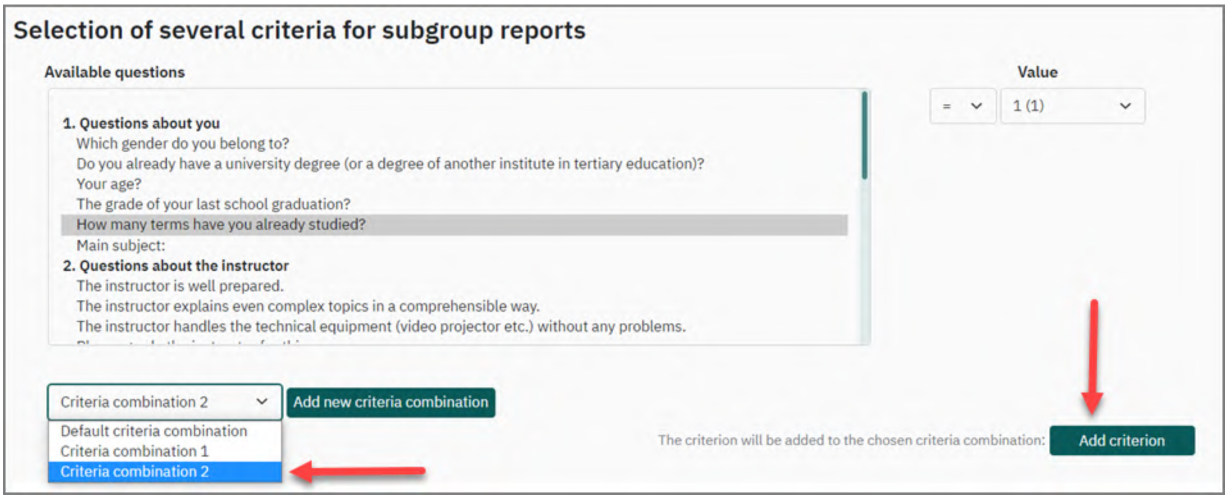
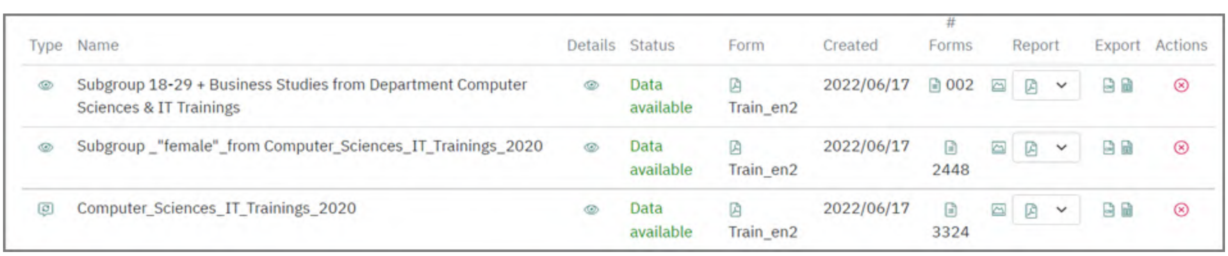


Figure 553: Report Creator: Selection of the Criteria Combination for the new Criterion

Subsequently, this criteria (= this question with the selected answer) is added to the selected criteria combination.

5.2.6. Information on a Report: Report List

The list of the reports of a folder provides you with an overview of the properties of the reports:



Type	Name	Details	Status	Form	Created	# Forms	Report	Export	Actions
	Subgroup 18-29 + Business Studies from Department Computer Sciences & IT Trainings		Data available	Train_en2	2022/06/17	002			
	Subgroup _"female"_from Computer_Sciences_IT_Trainings_2020		Data available	Train_en2	2022/06/17	2448			
	Computer_Sciences_IT_Trainings_2020		Data available	Train_en2	2022/06/17	3324			

Figure 554: Report Creator: Subunit Report as Overview

This view provides you with following information:

- Type of the weighting:
  - If it is a weighted, summarized report, the symbol as here at the top of the column, shows two sheets with arrows.
  - For unweighted reports a symbol with paper and a warning triangle appears here. For an unweighted report, choose the respective option whilst creating a report:

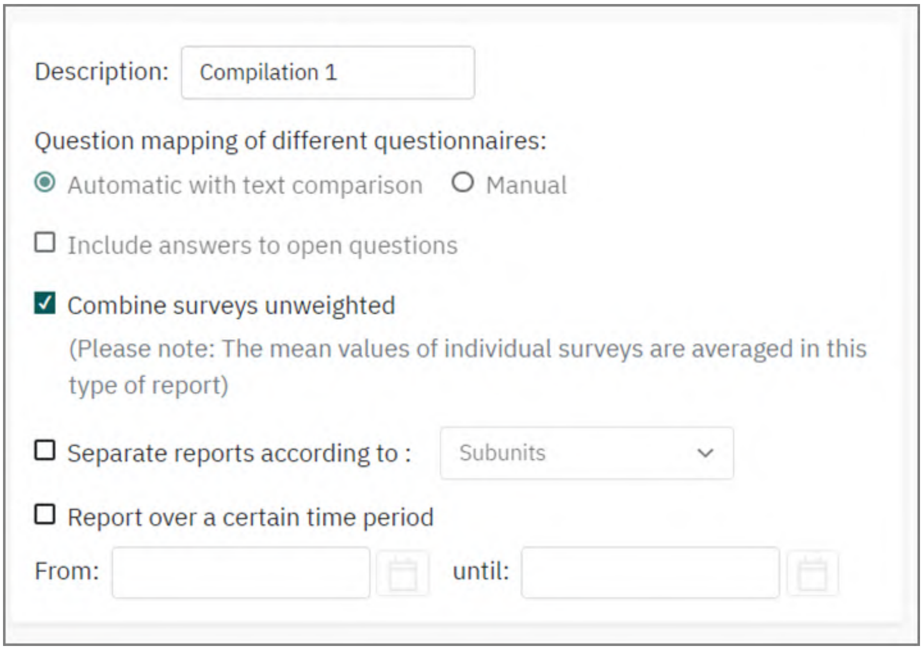


Figure 555: Report Creator: Create Unweighted Report

- The report that is then created shows a symbol with an exclamation mark. In the column “# Forms” the number of aggregated survey is displayed (and not, as with weighted reports, the number of responses).:

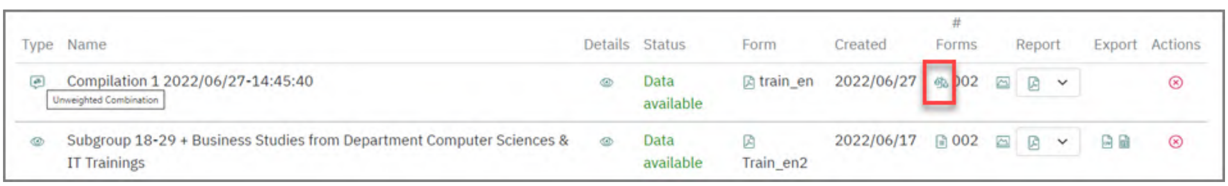


Figure 556: Report Creator: Unweighted Report

- **Name:** The name of the report corresponds to the name which you assigned during creation.
- **Status:** The status here always says “Data available” since in the report creator you can only summarize surveys for which data already exist, and therefore only produce surveys (meaning report) with the status “Data available”.
- **Form:** In the column “Form” you can call up the questionnaire sample and thus gain information as to which questionnaire this compilation is based on.
- **Created:** Here you can see when this report was produced.
- **Processed:** This column informs you of the number of returns (= filled-in questionnaires), in this case 131.
- **Del/Red cross:** By clicking on the trash can you can delete the report.

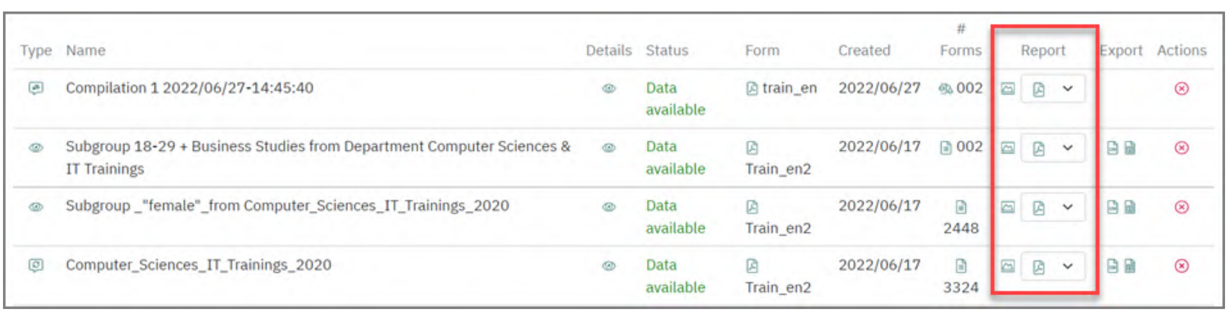
Please observe the following details:

- evasys does not hold any completed reports in memory. The automatically generated PDF reports for single surveys are also produced “on the fly”, when you click on [PDF] in the column “Report”.
- The report creator combines this data according to your reports and keeps it ready. When you click on [PDF], evasys produces the summarized report and displays it.
- This means that here you only delete the compiled data, however, you can reproduce the compilation again from your surveys at any time.

In the following figure you can see the confirmation if you like to delete a report.

Figure 557: Report Creator: Delete Report

- **Report:** Here you can download the HTML and the PDF report. Either you only see the lettering “PDF” for the download of the PDF report or a drop-down list. The latter is the case, if several PDF report definitions exist:



Type	Name	Details	Status	Form	Created	# Forms	Report	Export	Actions
	Compilation 1 2022/06/27-14:45:40		Data available	train_en	2022/06/27	002			
	Subgroup 18-29 + Business Studies from Department Computer Sciences & IT Trainings		Data available	Train_en2	2022/06/17	002			
	Subgroup _"female"_from Computer_Sciences_IT_Trainings_2020		Data available	Train_en2	2022/06/17	2448			
	Computer_Sciences_IT_Trainings_2020		Data available	Train_en2	2022/06/17	3324			

Figure 558: Report Creator: Download Reports

- The PDF report looks just as you are familiar with it from the automatically generated reports for single surveys (except for the letter and the PDF report header).

- In the following, the first page of the subunit produced report gives you an overview of the appearance of the PDF reports of the report creator:

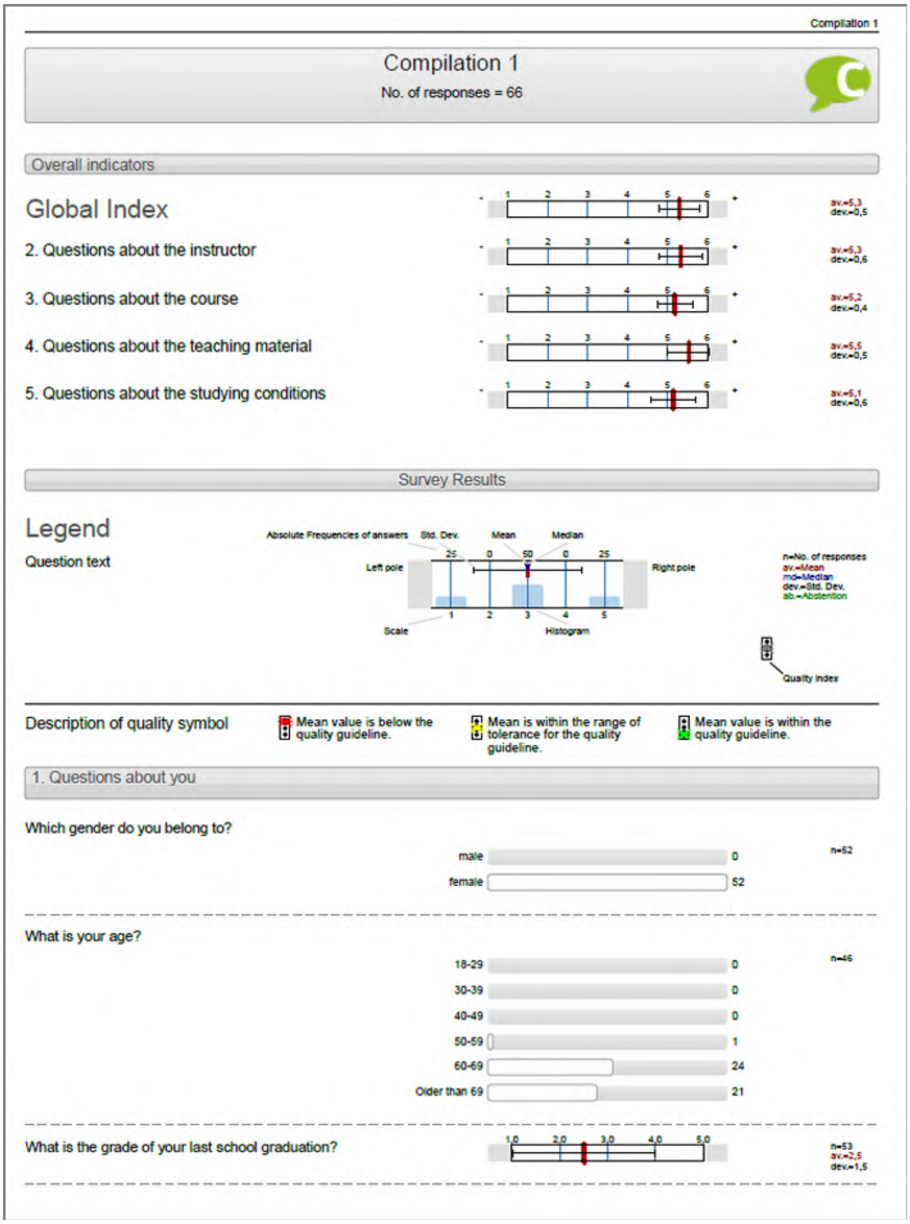


Figure 559: Report Creator: Example of a PDF Report (Page 1)

- As usual, the report header shows the title of the report. In addition, it displays the number of responses (46).
- According to the setting defined by the administrator, the details of the report are then displayed to you, here for example an overview over the indicators of the questionnaire. Following you will see the legend for the scaled questions as well as five diagrams for the first five questions of the questionnaire.

- **Export:** Here you can create export files for the subsequent processing in statistics programs:

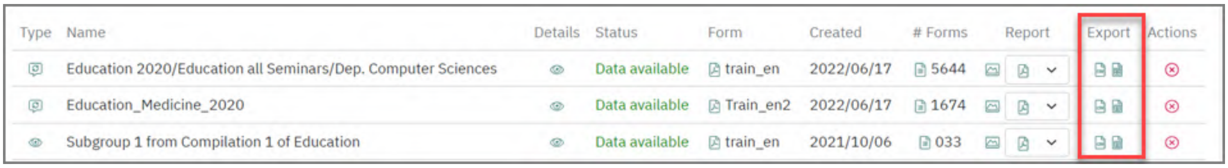


Figure 560: Report Creator: Export Options

- You always have the option of the CSV and SPSS export.
- For representation reasons you see here only two of the options, the SPSS export is, however, displayed in the details of the report.

5.2.7. Information on a Report: Detailed View

If you click on the name of a report, the detailed view is displayed to you:

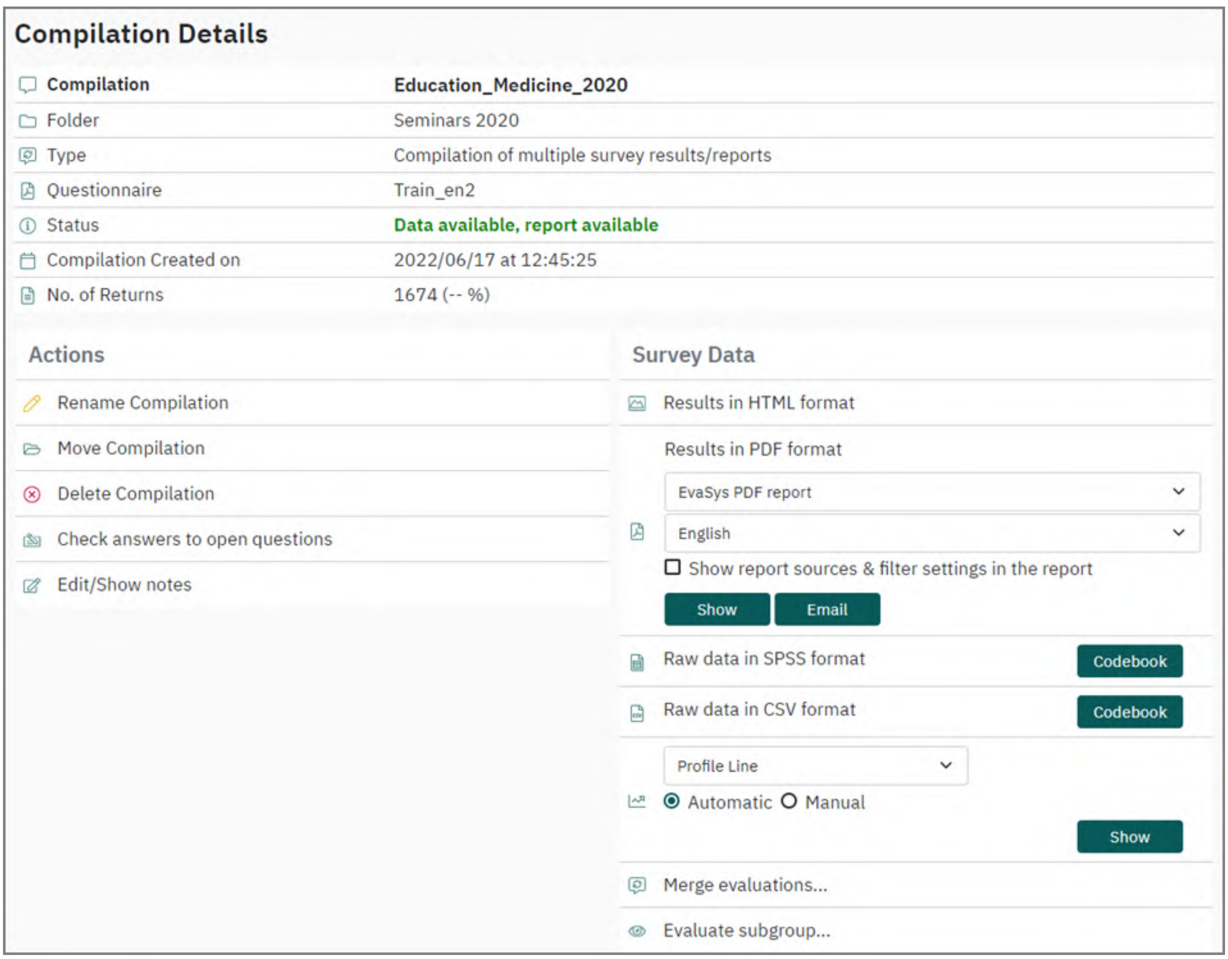


Figure 561: Report Creator: Detailed View of a Report

Here you receive information on the name, the folder and the type of the report created and, just like in the overview, you can call up the questionnaire template. The status, the creation date and the number of returns are also indicated here.

In the left part of the window in the area “Actions” you can rename the report – if for example you realize that you have produced a report bearing the same name as an existent one and, therefore, the date was added automatically at the end. Furthermore, you have the possibility of deleting the report.

In the right part of the window under “Survey data” you can download the evaluation in HTML and PDF format. If any user-defined PDF report definitions are associated with this questionnaire and/or if the questionnaire was translated, you can download the user-defined report or reports in other languages here.

In the following figure you can recognize, for example, that beside the evasys PDF report a user-defined report was produced automatically for the gender.

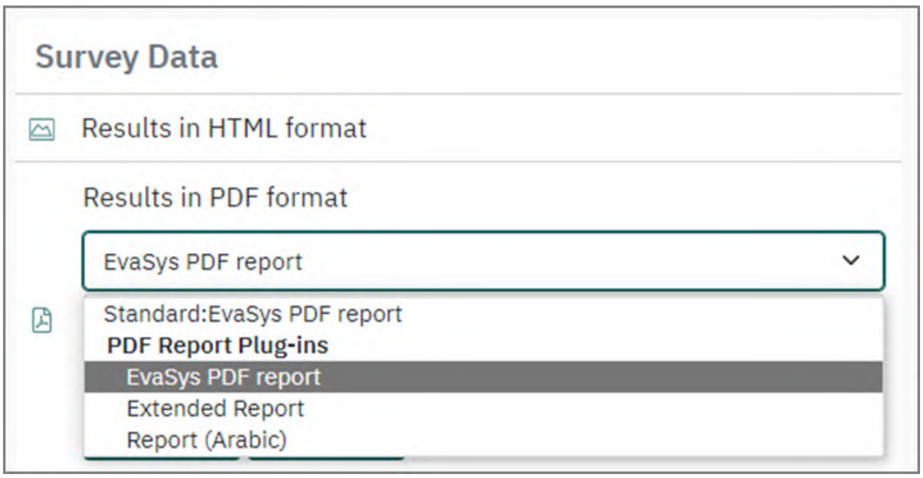


Figure 562: Report Creator: Detailed View: Downloading User-defined PDF Reports

If your questionnaire was translated, you can decide here on the language in which to download the standard or the user-defined report. Here a selection is possible between “English” and “French”:

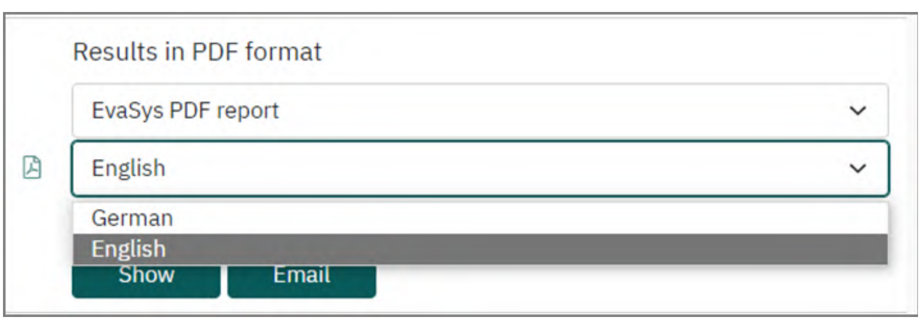


Figure 563: Report Creator: Detailed View - Downloading Multilingual Reports

With all summarizing reports, you also have the option to have the included surveys and any selected filters displayed in a tabular overview at the end of the report. This function first has to be activated in the central system configuration at “System Settings/evasys Settings/Functions/General/Display the source data & filter settings in reports of the report creator”.

To integrate the information into the report, activate the function “Show report sources & filter settings in the report” and click [Show].

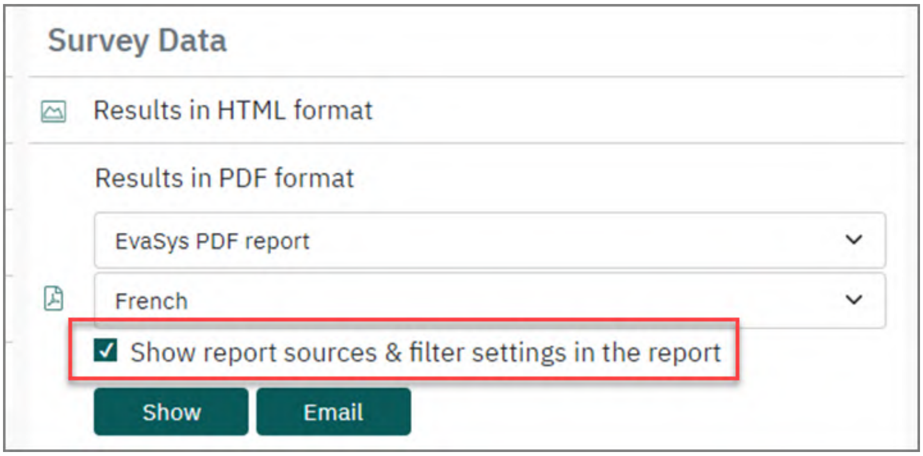
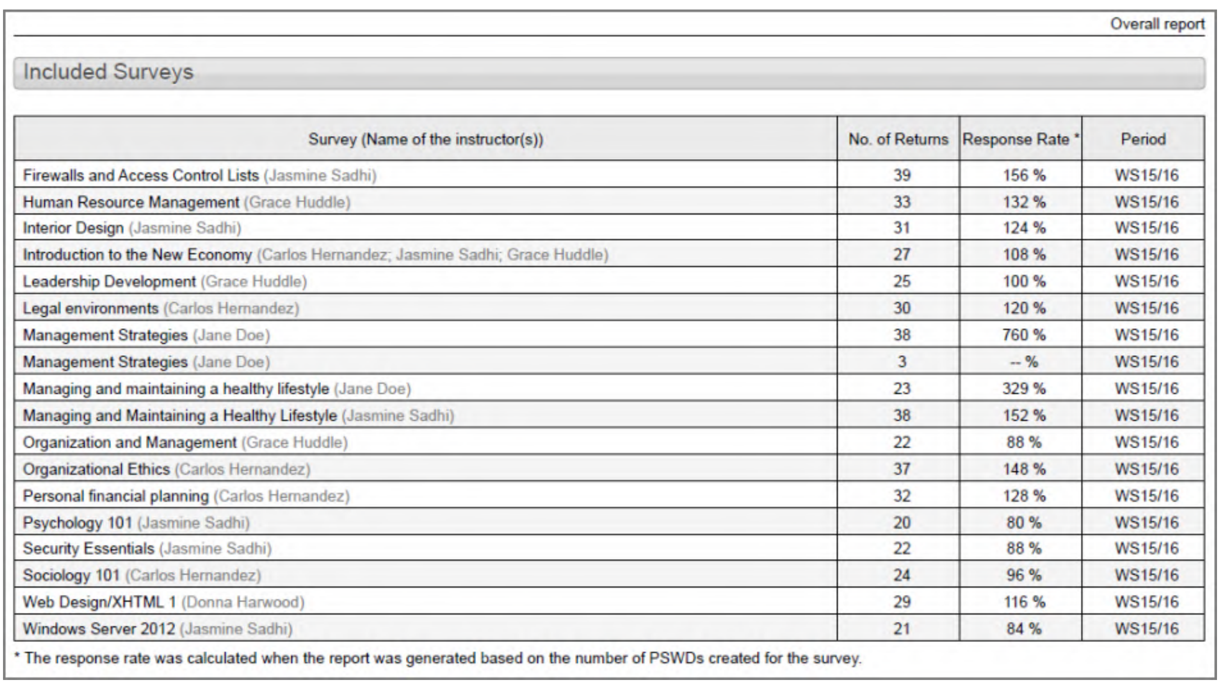


Figure 564: Displaying report sources and filter settings

At the end of the report that now opens, there is a tabular list of all surveys whose data has flown into the compilation. Besides the name of the survey and the instructor, the table also shows the number of returns and the response rate of the respective course, as well as the collection period from which the data originates.



Overall report

Included Surveys

Survey (Name of the instructor(s))	No. of Returns	Response Rate *	Period
Firewalls and Access Control Lists (Jasmine Sadhi)	39	156 %	WS15/16
Human Resource Management (Grace Huddle)	33	132 %	WS15/16
Interior Design (Jasmine Sadhi)	31	124 %	WS15/16
Introduction to the New Economy (Carlos Hernandez; Jasmine Sadhi; Grace Huddle)	27	108 %	WS15/16
Leadership Development (Grace Huddle)	25	100 %	WS15/16
Legal environments (Carlos Hernandez)	30	120 %	WS15/16
Management Strategies (Jane Doe)	38	760 %	WS15/16
Management Strategies (Jane Doe)	3	-- %	WS15/16
Managing and maintaining a healthy lifestyle (Jane Doe)	23	329 %	WS15/16
Managing and Maintaining a Healthy Lifestyle (Jasmine Sadhi)	38	152 %	WS15/16
Organization and Management (Grace Huddle)	22	88 %	WS15/16
Organizational Ethics (Carlos Hernandez)	37	148 %	WS15/16
Personal financial planning (Carlos Hernandez)	32	128 %	WS15/16
Psychology 101 (Jasmine Sadhi)	20	80 %	WS15/16
Security Essentials (Jasmine Sadhi)	22	88 %	WS15/16
Sociology 101 (Carlos Hernandez)	24	96 %	WS15/16
Web Design/XHTML 1 (Donna Harwood)	29	116 %	WS15/16
Windows Server 2012 (Jasmine Sadhi)	21	84 %	WS15/16

* The response rate was calculated when the report was generated based on the number of PSWDs created for the survey.

Figure 565: Tabular list of surveys included

Note:
The display of the response rate is based on the calculation method set in the configuration at “System Settings/evasys Settings/Survey/General/ Method of calculating the response rate”. If no response rate is indicated, please check the setting.

The report also indicates which filters are set for reports of the type “Any Compilation”. The display of the filter is only possible for this report type when filtering was not done via the tree structure. In the example given below, filtering is according to language, “German”. In this way, the report only includes data from courses given in English.

Used Filters

Courses - User Data Fields	Operator	Value
Criteria combination 1		
Language	=	english

Figure 566: Tabular list of filters

Below these options you have the possibility to export the raw data into the formats of SPHINX, SPSS and CSV:

Figure 567: Report Creator: Detailed View - Export Raw Data

The option “Profile line” allows you to have the profile lines of this report displayed separately:

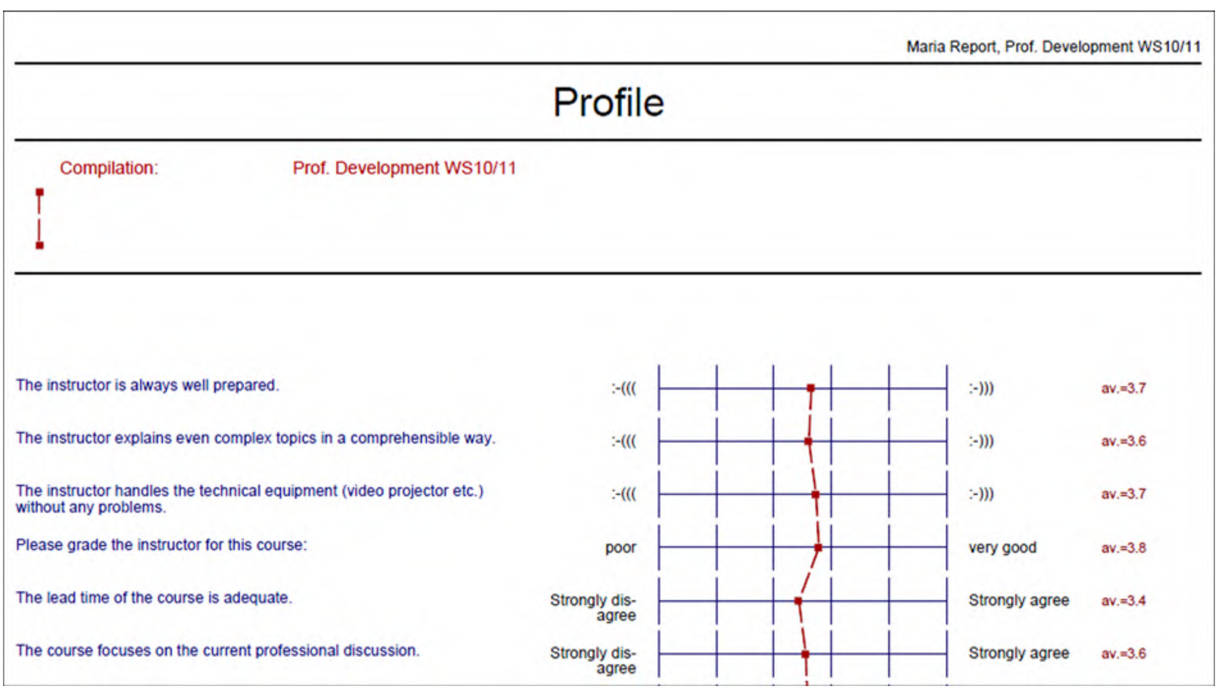


Figure 568: Report Creator: Detailed View - Profile Line of the Report

Furthermore, evasys can add a further profile line which you can select in the drop-down menu:

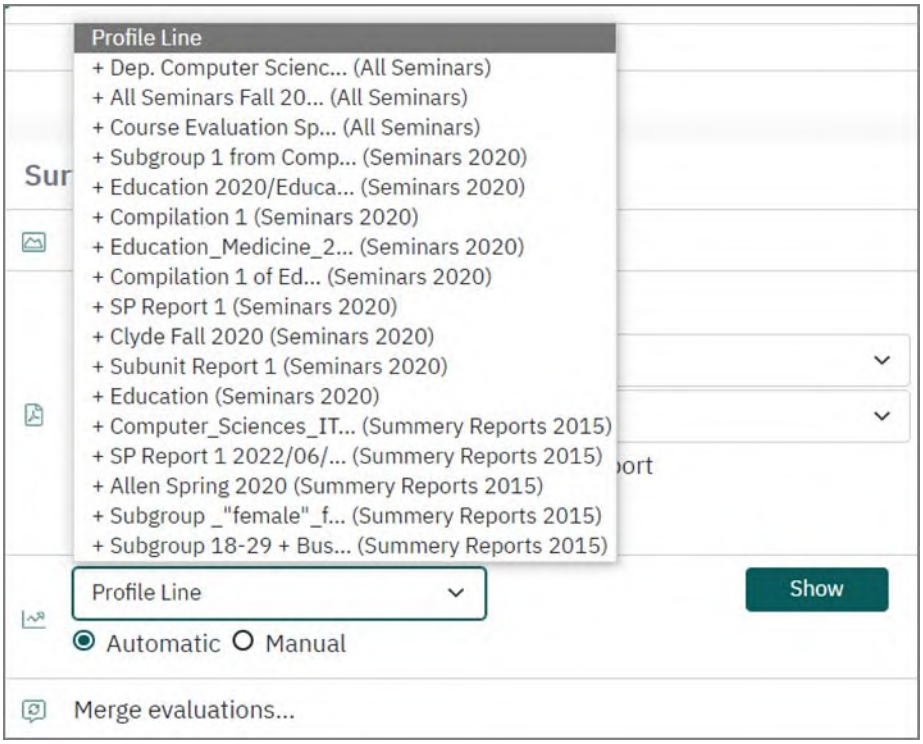


Figure 569: Report Creator: Detailed View - Selection of a Comparative Profile Line

Via the option “Merge evaluations” the report can be combined with further reports, and via the option “Evaluate subgroup” it can be filtered according to a specific aspect. You can obtain further information on this topic in the chapter on combinations and subgroups.

Note:
It is important to note that: The options “Merge evaluations” and “Evaluate subgroup” as well as the raw data exports are not available for reports with unweighted mean values. In unweighted compilations, no dual scale evaluation can be issued either (profile line, radar chart, or outcome-based evaluation).

Further possibilities of comparison are described in the following chapter.

5.2.8. Dispatch Comparative Profile Lines

You are already familiar with profile lines from the automatically generated PDF reports. They give a graphic overview on the results of your evaluation.

You can download these profile lines in the report creator for all surveys and all reports produced by the report creator and lay them over one another. This way the report creator compares completed surveys with one another and/or with the created reports. Since this comparison provides at a glance a comfortable and expressive overview of surveys, it is conducted often. A popular application is the comparison of a survey with the subunit report as well as the total evaluation.

Before you can create comparison lines, the necessary surveys and reports must of course be available.

Creating and Downloading Comparative Profile Lines

When you have created these, select the option “Batch Profile Lines” from the second drop-down list in the folder and click the button [Next]:

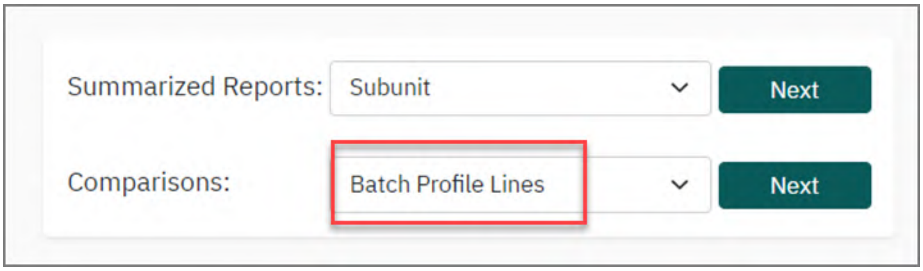


Figure 570: Report Creator: Create Profile Line Emails

Then the usual choices are presented to you in a new window. Select the desired subunits, the survey periods (here no multiple selection is possible), the course types and the questionnaire (here no multiple selection is possible).

As usual, the list of courses that meet all criteria is displayed:

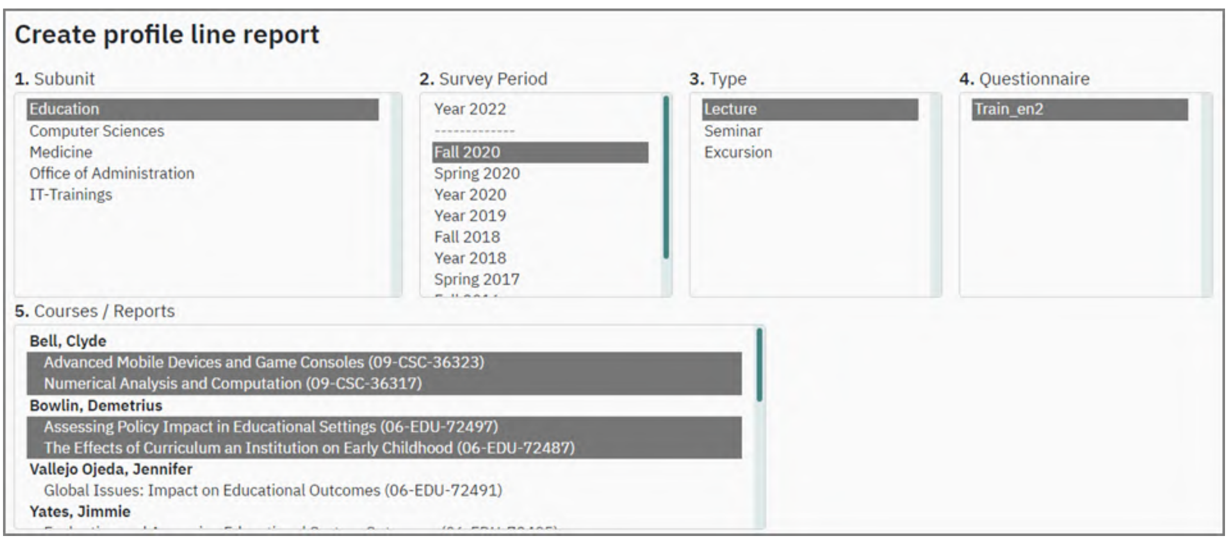


Figure 571: Report Creator: Profile Line Emails - Selection of Criteria

You can mark several courses/reports in the list of courses.

Additionally, you have the option to select the profile lines that every event should be compared with, under “First Comparison Line” and (as required) “Second” and “Third Comparison Line”.

Instead of a report, the option “Survey of same course in period XY” can also be selected. This selection adds the line of an earlier survey to the profile line of a selected course, if available.

If you make such a selection and then download the profile lines, a profile line is created for each selected course/report (except for those of the two comparative lines). In addition, the first profile line and, if selected, the second profile line are laid over each other. You thus receive a document which bears at least as many pages as selected courses.

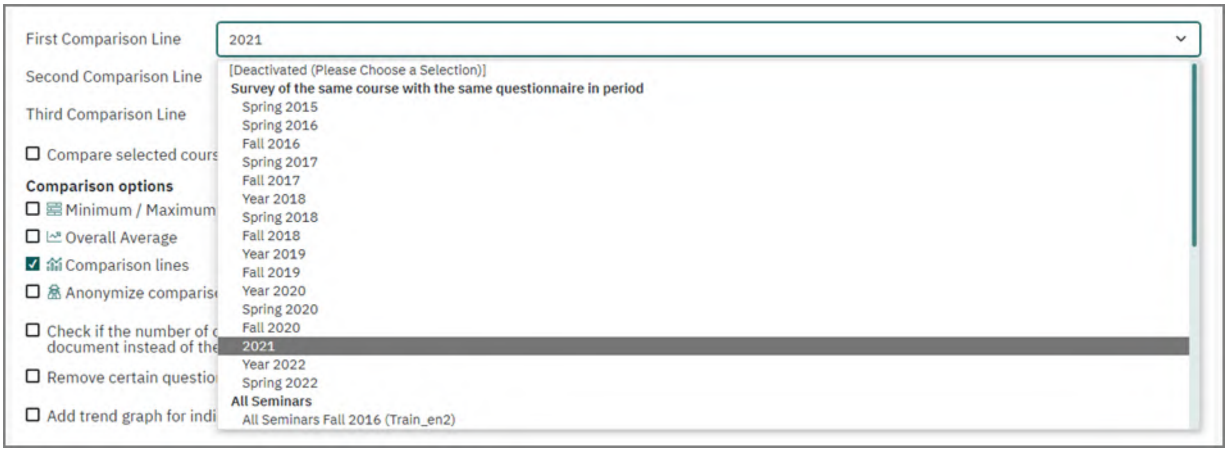


Figure 572: Report Creator: Profile Line Emails - Selection of a Comparative Profile Line

After the selection you can scroll to the end of the page and choose one of the following download methods:

- Dispatch of the profile lines to the instructors of the marked courses. This option ensures that each instructor is only sent the profile line of his or her course (if selected, with the first and second comparative lines that are inserted into the graphic). If you mark the option “Additional recipient”, you are presented in a further field with the possibility to enter further email addresses (separated by a semicolon):

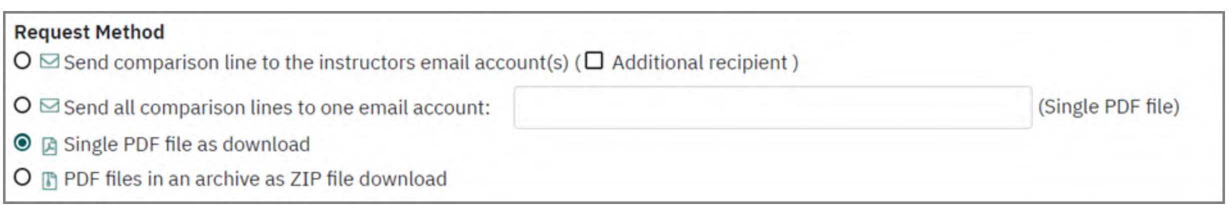


Figure 573: Report Creator: Profile Line Emails - Send a Comparative Profile Line

- Dispatch of the profile lines to defined recipients. As described above, enter the email addresses of the desired recipients. In this case, however, the instructors of the selected courses do not receive your email:

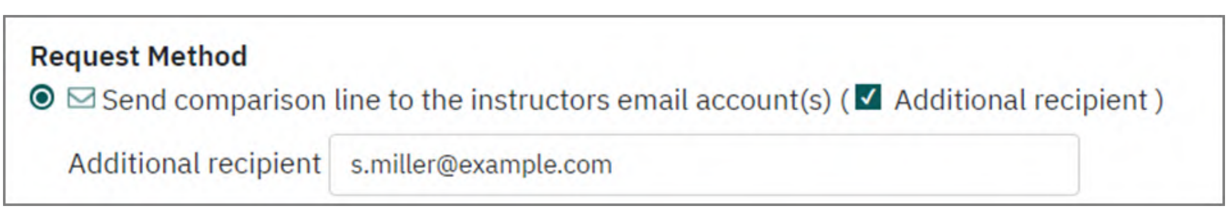


Figure 574: Report Creator: Profile Line Emails - Additional recipients

- Download of the profile lines. If you choose this option, you can subsequently open and view the profile line directly or save it.

- Download of the profile lines (zipped). Corresponds to the version just described with the difference that here you can download a zipped file.

Thus you download – except for the first option – a document containing the profile lines of all selected courses.

Example 1:

Here the course “Advanced Mobile Devices and Game Consoles” (instructor: Clyde Bell) is selected from the list of courses, and as the first comparison line “Subunit Report 1 (Train_en2)” (the name of the subunit report):

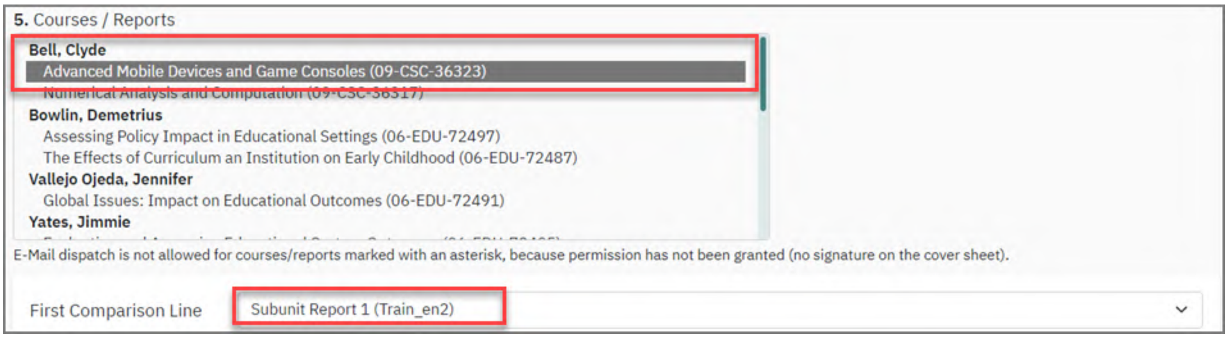


Figure 575: Report Creator: Selection of Profile Line and Comparison Line

When you download with this selection the batch the following profile line appears:

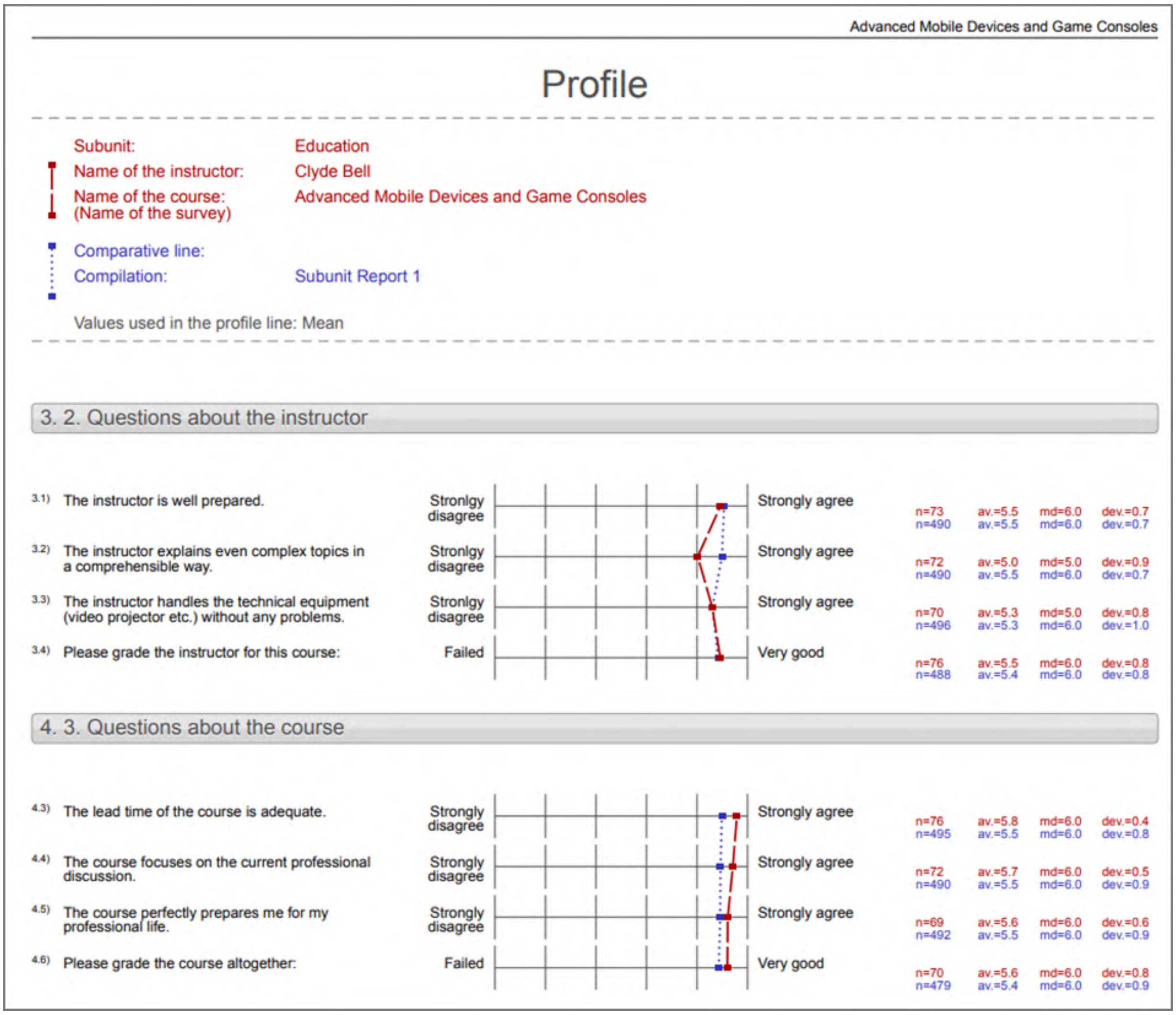


Figure 576: Report Creator: Comparative Profile Line

In the header you first see all of the information on the selected courses and/or reports, followed by the list of questions on the left which are complemented on the right by the two overlaid profile lines as well as averages.

As usual with the profile lines, only questions regarding the standard value and scaled questions are displayed here.

Example 2:

In addition to the course “Advanced Mobile Devices and Game Consoles” by Clyde Bell you also mark the course “Numerical Analysis and Computation”, and choose as comparative profile line “Clyde Fall 2020”. You leave all other options at their default value:

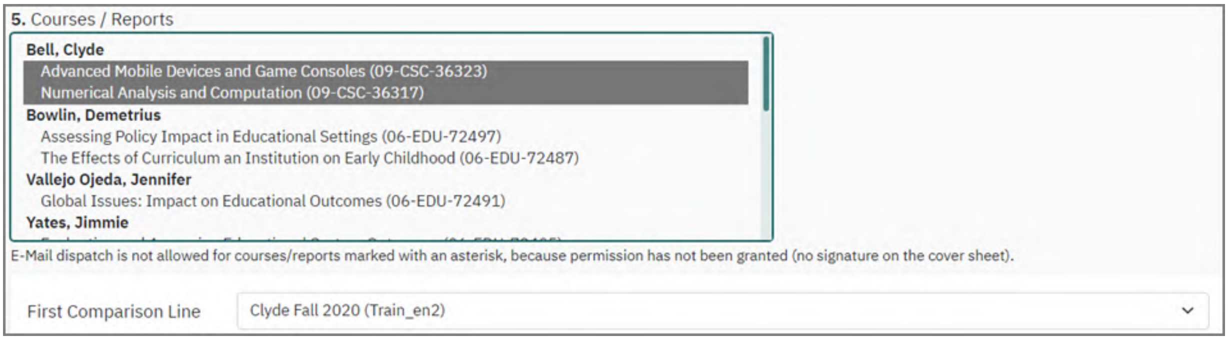


Figure 577: Report Creator: Select two Courses + Comparison Line

In this case in the PDF you will see the profile line comparison shown above on the first page. On the second page the profile line of the course of Leadership Development is compared to the first comparative line (Clyde Fall 2020).

Comparison Options during the Batch Profile Line Dispatch

Below the selection of the comparative lines you have the option to modify the presentation of the profile line comparison through a number of options, or to integrate additional comparative lines:

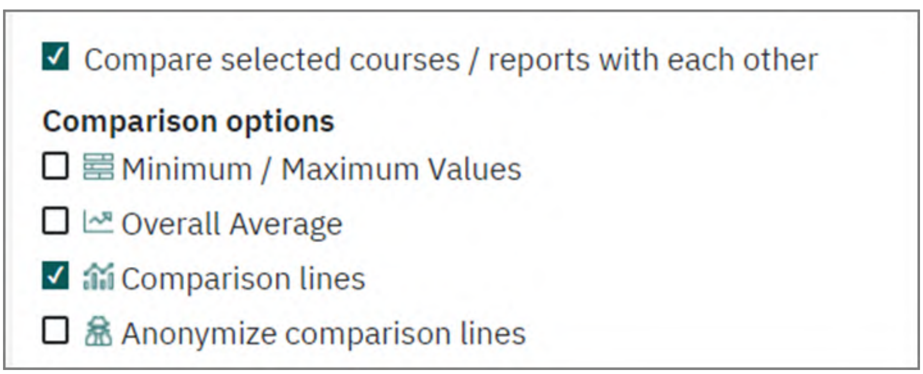


Figure 578: Report Creator: Profile Line Emails: Options

Comparison of the Selected Courses/of Reports to Each Other

Activate this option if you wish to compare the selected courses/reports not only with the respective comparative lines, but also with one another.

Though in this case a profile line comparison is created for each course/report, the profile lines of ALL selected courses/reports are contained in each graphic.

Example 2, continuation:

In the upper example 2 this would mean that in the graphic for Human Resource Management additionally the profile for Leadership Development is included and the other way round as you can see in the figure below.

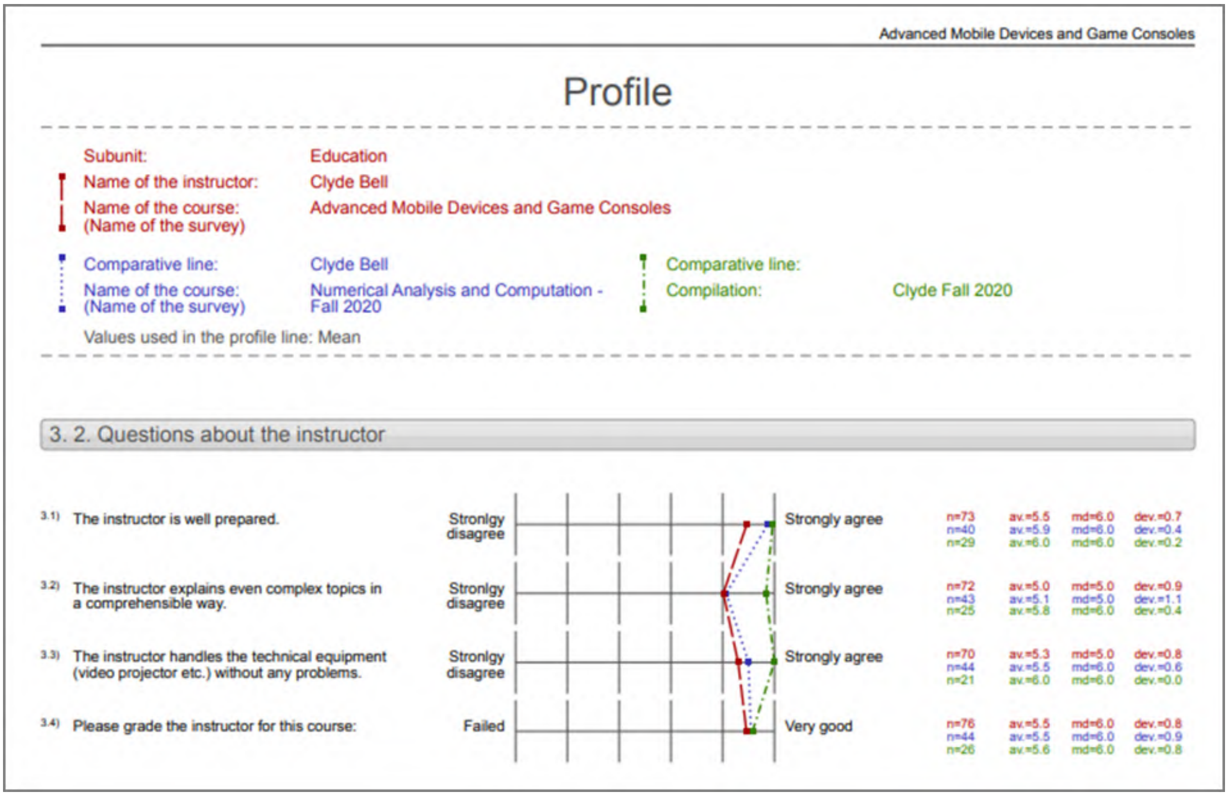


Figure 579: Report Creator: Profile Line Emails - Compare Selected Courses with Each Other

> **Note**:
>
> You can compare a maximum of eight courses/reports.

If you do not activate the option “Comparison of the selected courses/of reports to each other”, the number of eligible courses is unlimited. (But then the profile lines will not be shown in one and the same diagram.)

Minimum/Maximum Values

The worst or the best value within a comparison group determines the margin of the presentation area. If the option “Minimum/Maximum Values” is activated, the space between these worst or best values and the scale edges is grayed in:

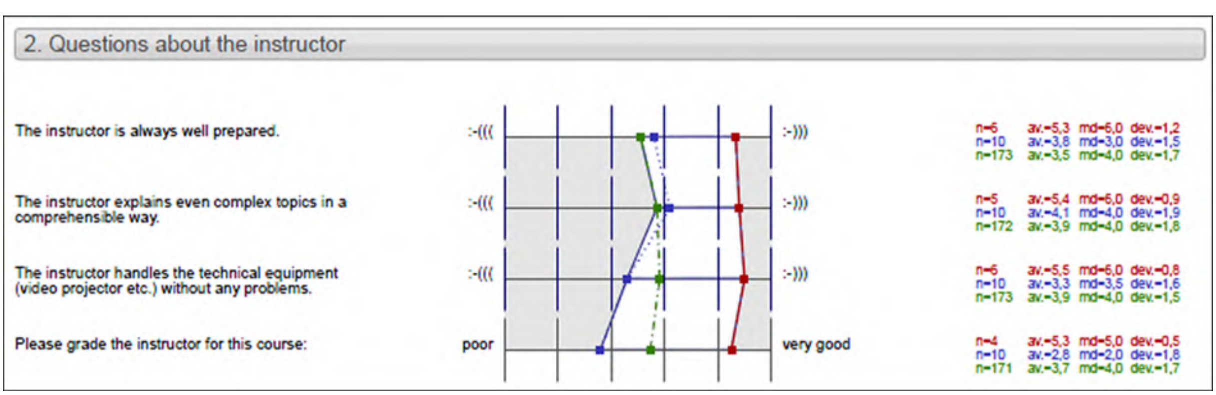


Figure 580: Report Creator: Profile Line Emails - Options: Minimum/Maximum Values

Overall Average

In addition to the profile lines of the courses/reports you selected you can have their overall average displayed (as a thick black line). For this, activate the option “Overall Average” in the comparison options. Here you see an example:

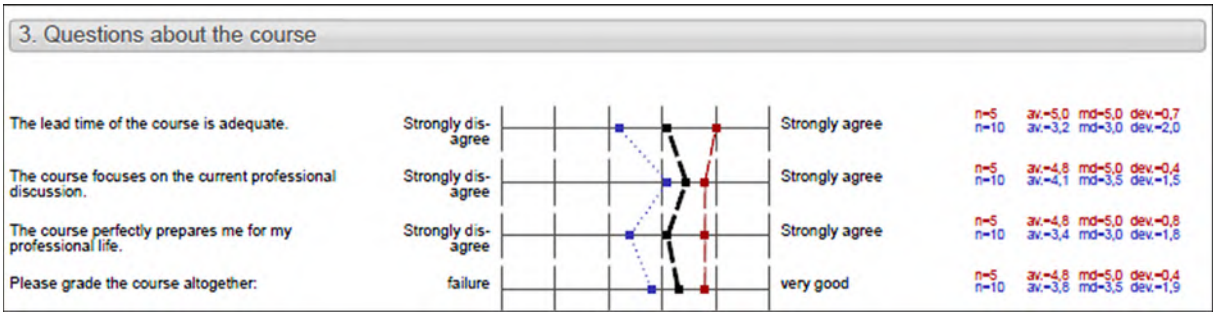


Figure 581: Report Creator: Profile Line Emails - Options: “Overall average”

Comparative Lines

This option is activated as default. Because it ensures that all comparative lines are displayed.

If you deactivate the “Comparison lines”, the graphic only contains the profile line of the selected course/report, all others are not displayed.

So that you can use this function meaningfully in its deactivated form, you should bear in mind the following two points:

- If this option is deactivated, you must select either “Minimum/Maximum Values” or “Overall Average” instead (or, of course, both). Since through the deactivated function you do not display anything but the current course, a comparison is otherwise not possible.
- Do not activate any first or second comparative line, as then you would restrict yourself to “5. Courses/Reports”, in order to select profile lines.

If you activate the “Minimum/Maximum Values” and/or the “Overall Average” but deactivate the “Comparison lines”, only the respective current profile line will be displayed to you; the values of further courses/reports, however, flow into the calculation of the minimum/maximum values and that of the total average.

Example:

In practice, this looks, for example, as follows:

Under “5. Courses/Reports” you select “Dynamics” and “Data Analysis” as well as the report “Engineering_2013”. The first and second comparative line remain deactivated.

Now tick “Comparison of selected courses/of reports with each other”.

In the comparison options the “Minimum/Maximum Values” are activated, and “Comparison lines” and the two other options are deactivated.

Everything else remains the same. The graphic contains only one course each in this example, but the values of the others are taken into account, clearly proven by the grayed zones.

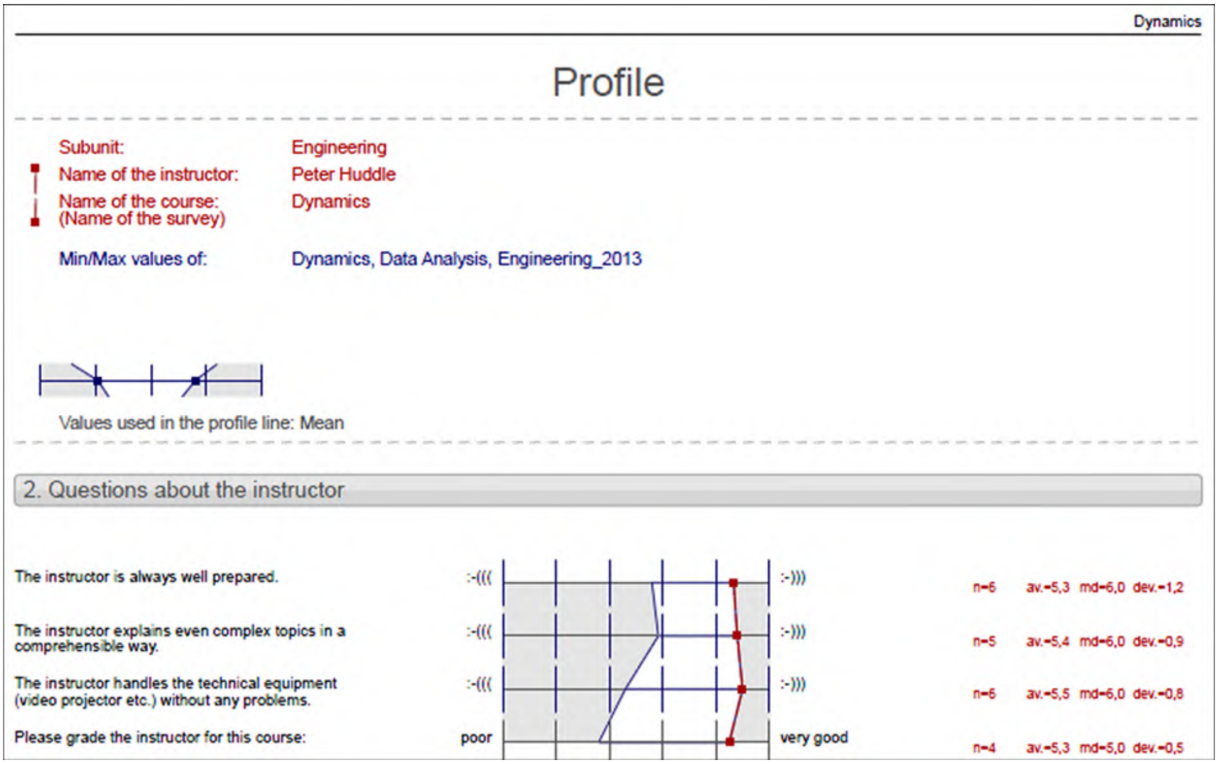


Figure 582: Report Creator: Profile Line Emails - Options: "Comparative line" (deactivated) with Minimum and Maximum Values

Here you only see one profile line (in this case for the first selected course). The gray zones show, however, that the calculation of the minimum and maximum values includes further values.

If you activate the overall average line instead of the minimum and maximum values, this profile line appears in addition to the profile line of the current course:

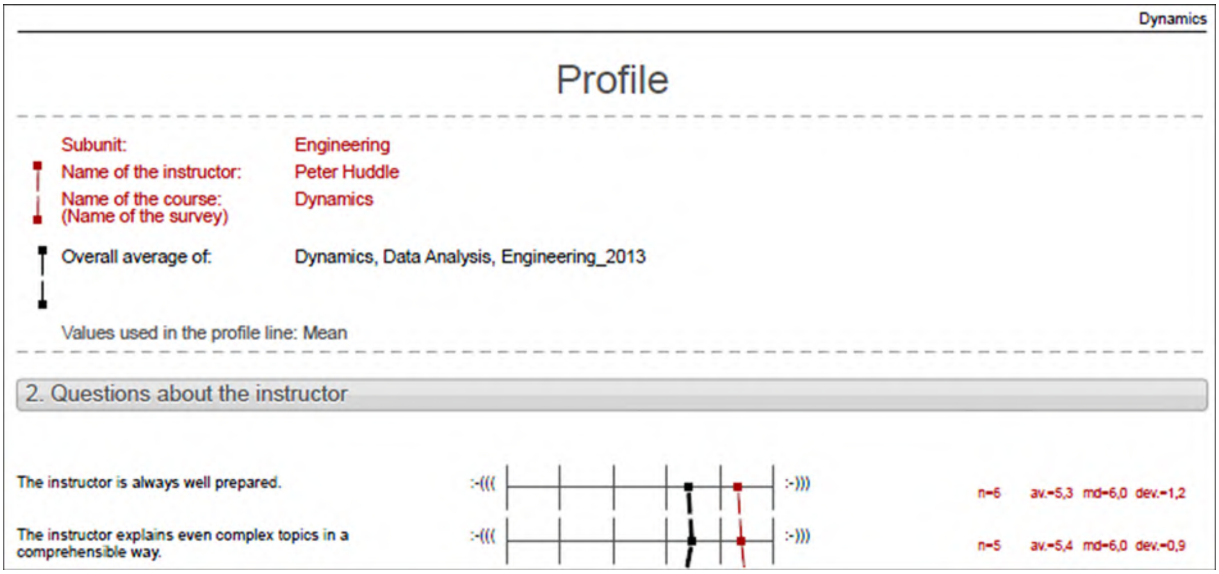


Figure 583: ***Report Creator: Profile Line Emails - Options: "Comparative line" (deactivated) with the Overall Average***

Anonymizing Comparative Line

With the comparison of several events/reports to each other it is possible, for data protection reasons, to anonymize the names of all comparative lines. So the instructor to whose course it relates, only sees the name of his course, the rest is anonymized ("Comparative line [Course1]"/"Comparative line [Report 1]").

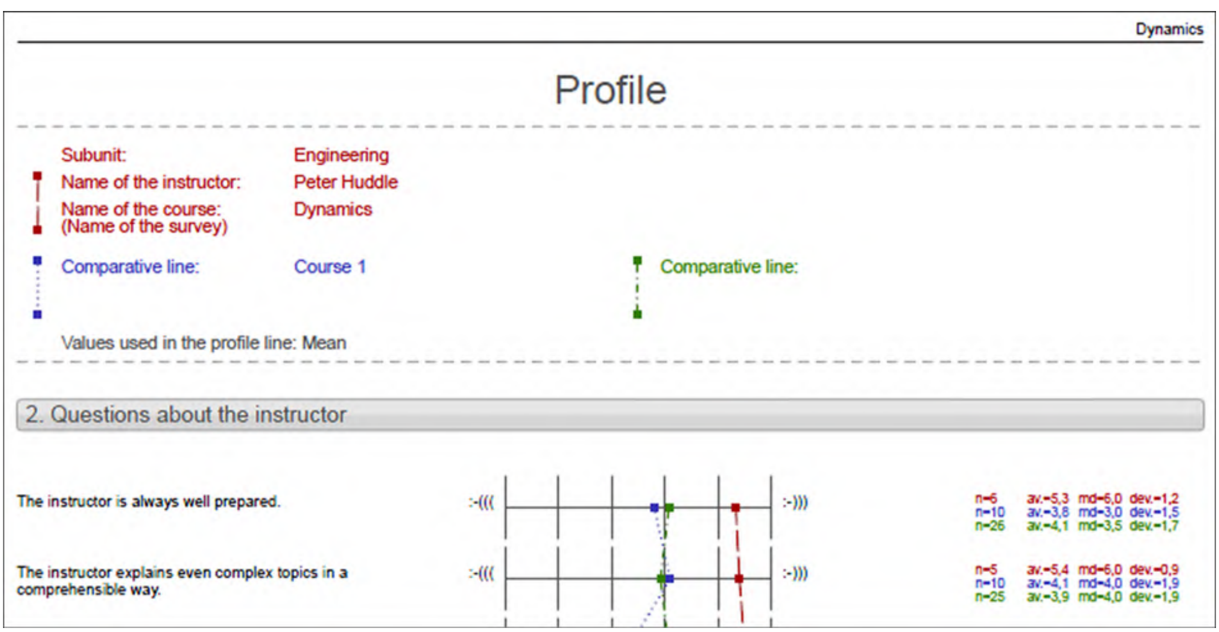
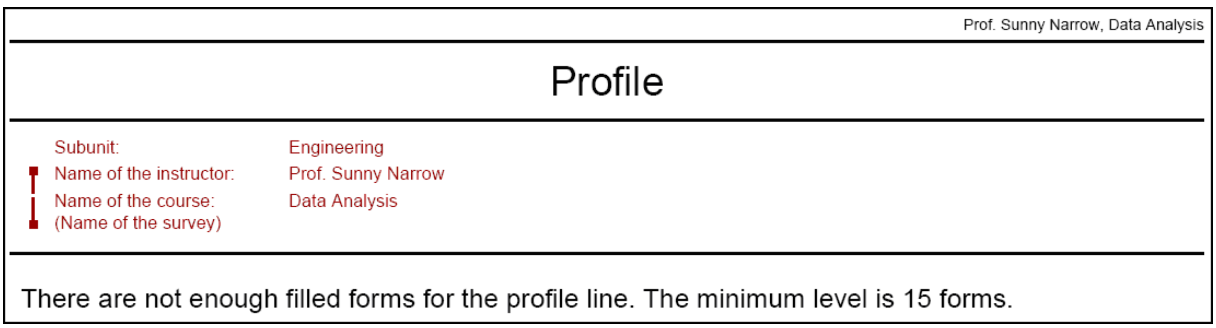


Figure 584: Report Creator: Create Profile Line Emails - Options: "Anonymize comparative lines"

Of course these options can also be combined. You could, for example, have a profile line comparison displayed to you in which you mark the minimum and maximum values with gray, add the total average to the graphic and anonymize the comparative lines.

Hint on Falling Short “Short Number of Minimum Responses”

If you wish to display the profile lines only for the surveys that achieved a certain level of participation you can freely define this through “Check if the number of completed forms exceeds the minimum level (defined in parameters)”. If this option is activated, the limitation applies which the administrator has set in the menu “System Settings/ evasys Settings/Survey/Minimum number of returns for reporting”. If the number of returns to a survey lies below this value, instead of a profile line a corresponding message is displayed:


Prof. Sunny Narrow, Data Analysis

Profile

Subunit:	Engineering
Name of the instructor:	Prof. Sunny Narrow
Name of the course: (Name of the survey)	Data Analysis

There are not enough filled forms for the profile line. The minimum level is 15 forms.

Figure 585: Report Creator: Create Profile Line Emails - Options: “Check if the number of completed forms exceeds the minimum level (defined in parameters)”

Excluding Questions from the Presentation

When you activate the option “Remove certain questions from profile line(s)” and click on [Request], the questions of the questionnaire are displayed prior to the dispatch or download, so that you can exclude individual questions from the presentation of the profile line.

Of course, only those questions that can also appear in the profile line are presented, meaning only questions regarding the standard value and scaled questions:

Figure 586: Report Creator: Profile Line Emails - Option: “Remove certain questions from profile line(s)”

Adding Trend Graphic

If you have defined indicators for the relevant questionnaire, you can display a trend graphic in addition to the profile line. For this purpose, mark the option “Add trend graphic for indicators to the profile line (as far as corresponding data is available over several survey periods)”.

The trend graphic shows you a course of time of the averages for indicators determined over several survey periods:

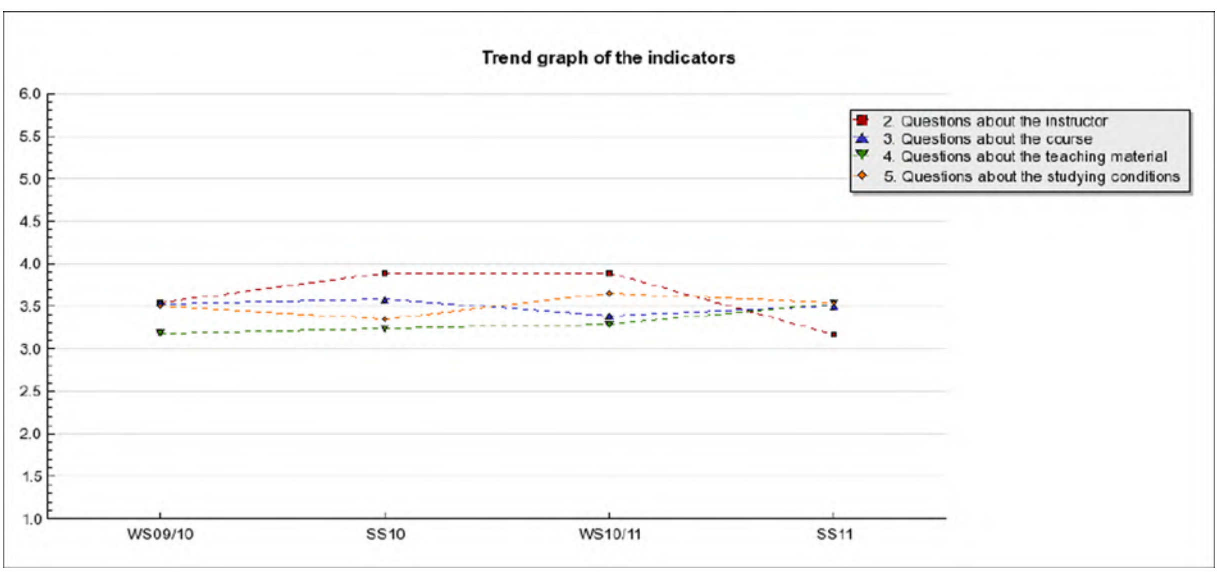


Figure 587: Report Creator: Profile Line Emails - Trend Graph

Prerequisite for this is the availability of indicators on the selected questionnaire as well as captured data from several survey periods. The trend graphics each show groups of up to five indicators with a maximum of five survey periods in one graphic. If data is available from more than five survey periods, the graphics are divided up correspondingly.

Assignment of the Questions in the Case of Different Questionnaires

As you are familiar from the report creation, with profile line comparison you have the option to compare surveys that are based on different (but comparable) questionnaires. To do so, there both options are available: the automatic and the manual questionnaire comparison. Please activate one of the two options here if you use surveys with several questionnaires.

With these options you have diverse possibilities to use the batch profile lines for comparison purposes. In conjunction with the summary reports, this is a powerful tool for processing your data at hand.

5.2.9. Result Reports

With the report creator you can download further reports that provide an overview of survey results to the management of your institution or your company. You can find these reports in the menu “Reports” on the left hand side.

Using this function you can create summary reports for the president for studies, the deans of studies as well as the deans, which give them an overview of the results of the evaluations. These functionalities are for questionnaires that were set up for the creation of summary reports.

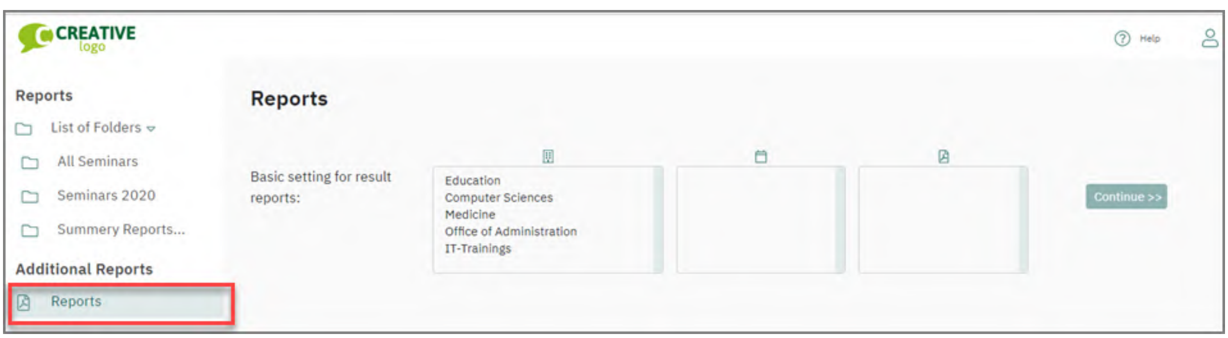


Figure 588: Additional Reports

There are three report forms for summary reports:

- Report for the president

  Contains an overall indicator for all surveys in the past semester sorted according to subunits.

- Report for the dean

  Contains an overall indicator as well as individual indicators for all surveys in the past semester in his or her own subunit.

- Report for the dean of studies

  The dean of studies selects from a general list of all surveys in all subunits those which should be compiled in his report. The report has the same degree of detail as for the dean.

General Settings

First you must select a general setting. Choose a subunit, a survey period and a questionnaire and then click on [Continue >>].

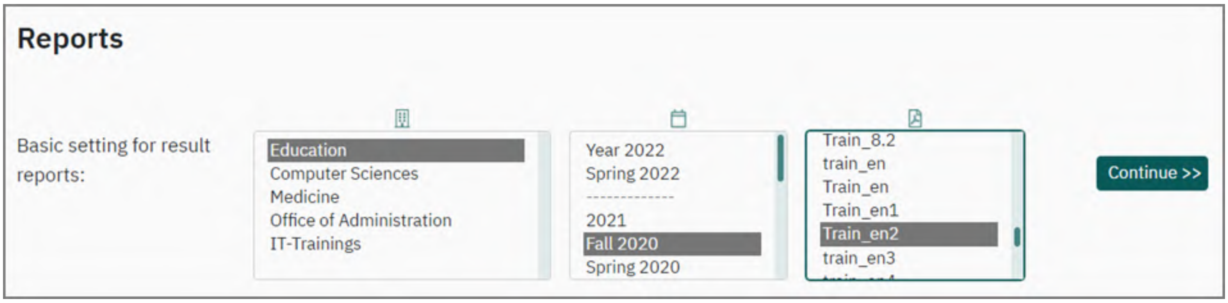


Figure 589: Additional Reports: First Choose

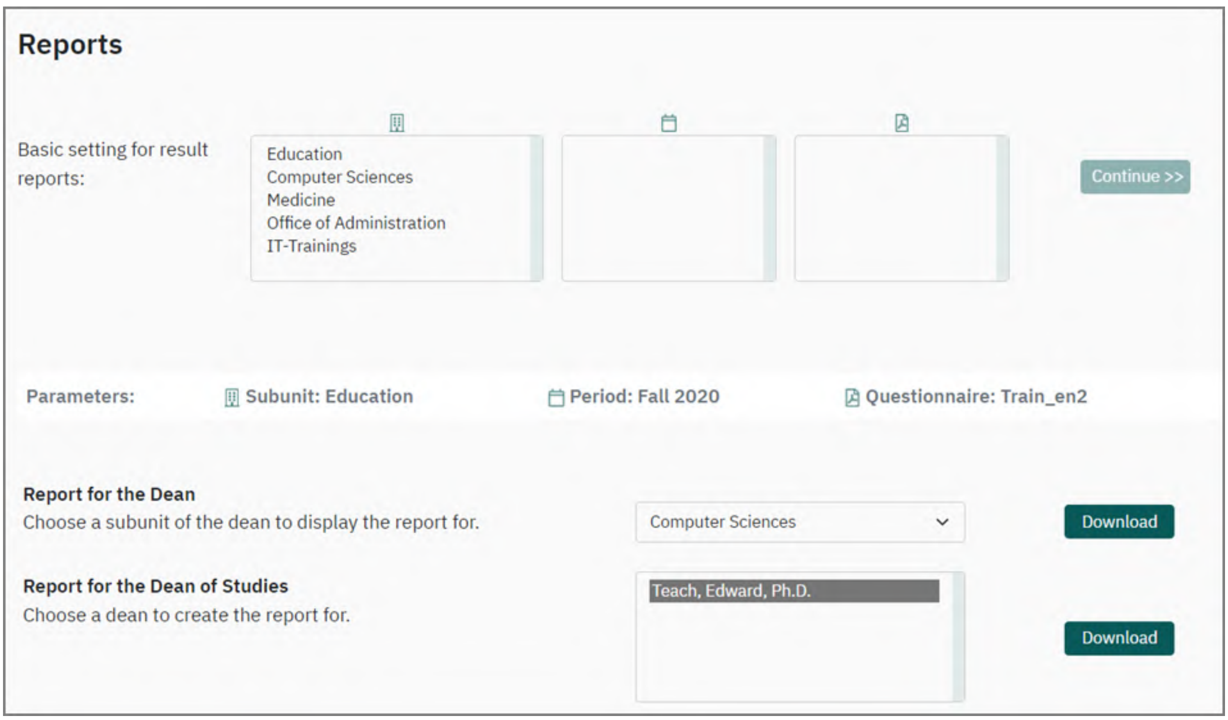


Figure 590: Additional Reports: Generating aggregated Reports

The general setting can always be selected again at the bottom of the screen “generating reports” and applied with [Next].

Report for the President

Figure 591: Additional Reports: Report for the President

Click on [Download] to create the PDF document. You will then be able to download it shortly.

Report for the Dean

Figure 592: Additional Reports: Report for the Dean

Select the subunit. For the letter accompanying the report the address in the subunit details will be used. The dean will be addressed in neutral terms as s/he or she is not in the system as user. Click on [Download] in order to create the document.

Report for the Dean of Studies


Courses provided by the subunit Education

	Course name	Instructor	Course Type	ID	Location
☑	Advanced Mobile Devices and Game Consoles	Bell	Lecture	09-CSC-36323	R-636
☑	Analyzing Effectivness in Educational Systems	Bowlin	Seminar	06-EDU-72494	R-586
☑	Assessing Policy Impact in Educational Settings	Bowlin	Lecture	06-EDU-72497	R-821
☑	Challenges in Urban Education	Bowlin	Excursion	06-EDU-72502	R-418
☑	Collaboration, Families and Case Managment	Yates	Seminar	06-EDU-72500	R-065
☑	Creating Communities of Interest	Vallejo Ojeda	Excursion	06-EDU-72484	R-459
☑	Culture Learning in Schools	Vallejo Ojeda	Excursion	06-EDU-72492	R-276

Figure 593: Additional Reports: Selection of Courses for the Dean of Studies

For the report type dean of studies it is essential that the user profile of the type dean of studies has been set up.

The deans of studies can then login with user name and password and from a list of all evaluated courses select those that they would like to have in their report. The user type dean of studies cannot however create this report himself. This is done on the report creator interface

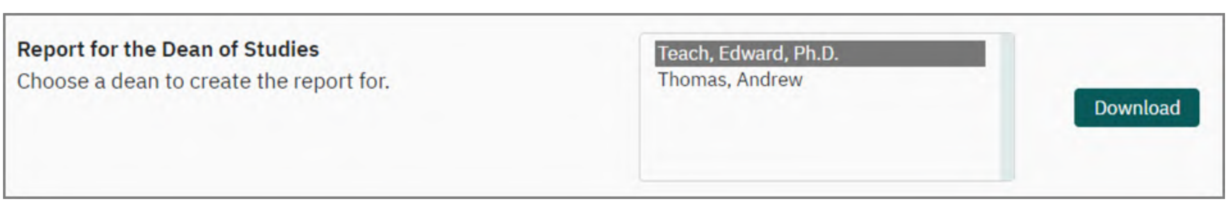


Figure 594: Additional Report: Report for the Dean of Studies

Select the name of the dean of studies whose report should be created. Click on [Download] to create the document.

5.2.10. Integrating Profile Comparison Lines in the PDF Report

Comparative Profile Lines in the PDF Report – Fundamental Possibilities

The automatically generated PDF report of a survey shows you (if activated in the configuration of the corresponding PDF report) a profile line at the end. With regard to scaled and matrix questions, it gives you an idea of how the interviewees voted.

Additionally you have the possibility to display other comparison lines together in addition to the current profile lines in the automatically generated PDF report. The following comparison lines are possible:

- Comparison lines from (up to five) previous periods
- A comparison line, originating from a report of a report creator or from a manually defined database
- Up to five automatic comparison lines which are based on defined filter levels and which are automatically created based on the existing raw data in the system

Thus, a maximum of 11 comparison lines are possible in the PDF report.

You can specify which profile lines you would like to see in a PDF report in the details of the questionnaire (Main menu “System Settings” → questionnaire list → click on the name of the relevant questionnaire).

In order to activate the profile lines for a questionnaire, go to the questionnaire details, in the area “Evaluations” and select the option “Comparison report” in the drop-down menu and click subsequently on [Edit]:

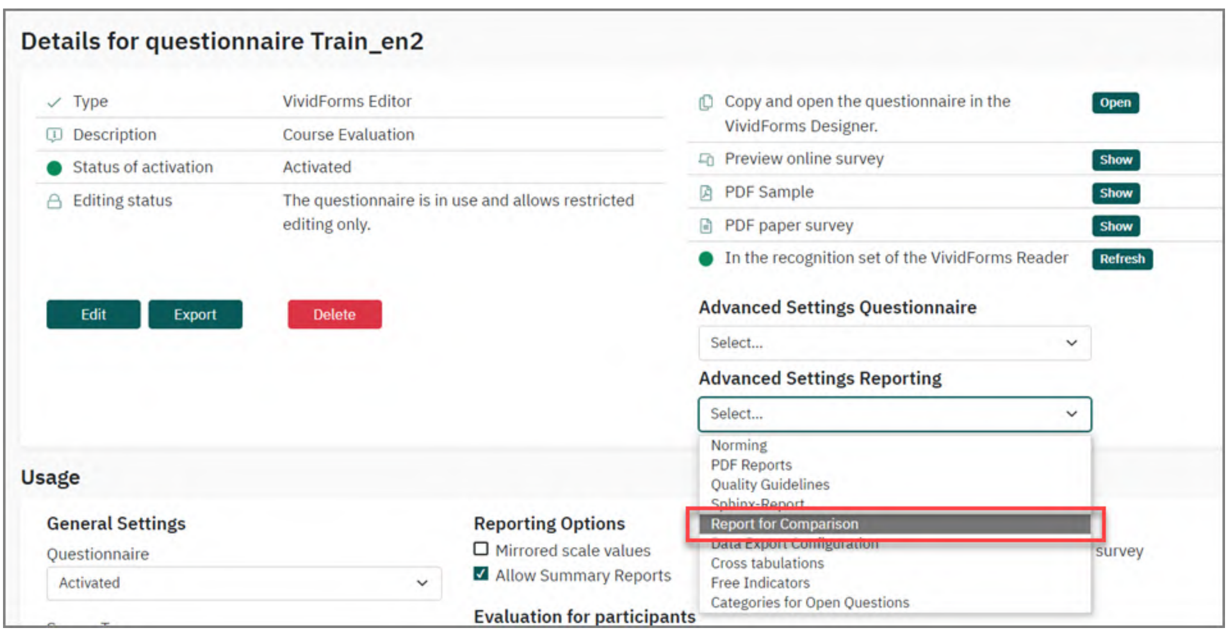


Figure 595: Profile Line Comparison: Selecting the option “Report for Comparison”

The following window opens automatically, in which you can define the number of previous periods for the comparison lines:

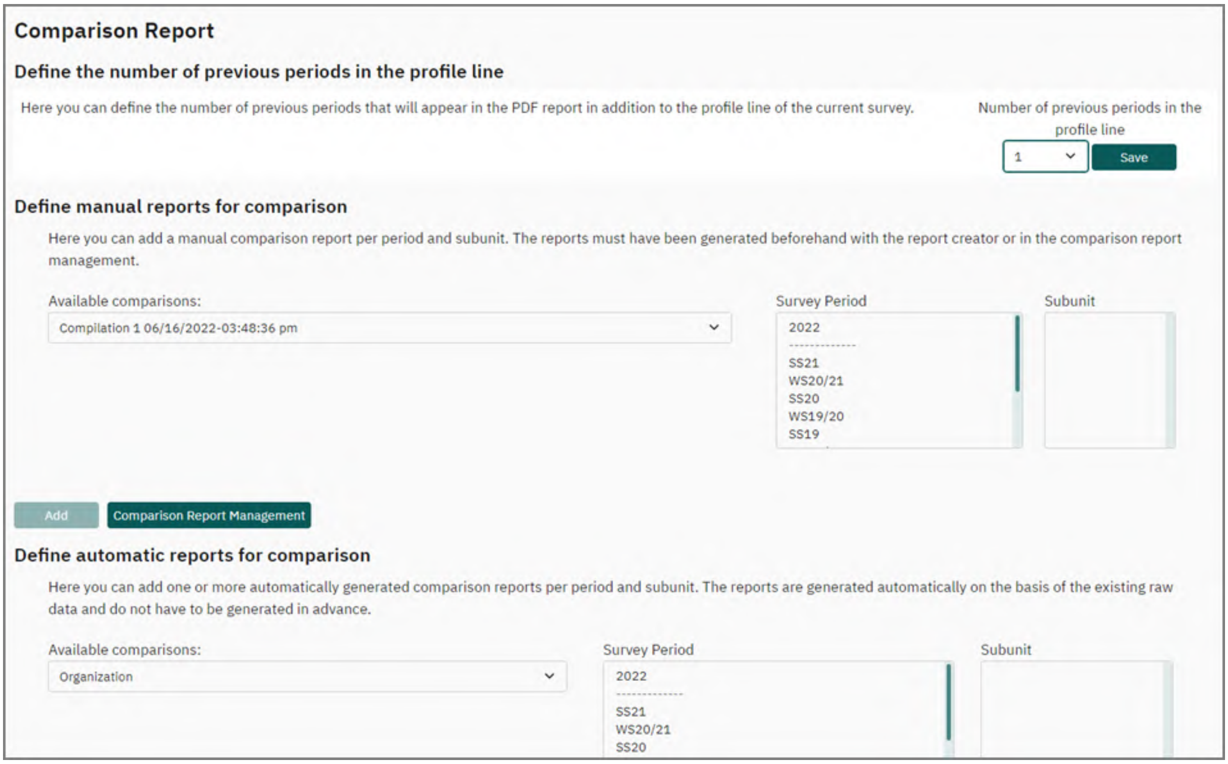


Figure 596: Profile Line Comparison: Defining Previous Periods and Comparison Reports

Define the number of previous periods in the profile line

In the first part, you define how many previous periods are to be considered in the profile line. This means: the profile line of the period of the current survey will be compared to the profile lines of the survey of the same course from the previous period.

Here you can choose between none and five previous periods. If, for example you wish to include two previous periods for comparison, select the number two here.

Abbildung 597: Define previous periods

In every PDF report for surveys that were created with this questionnaire, you will see the comparison profile lines of the two previous periods in addition to the current profile line of the survey. This is however only valid under the premise that data for these three periods is available in evasys. This does not only apply for the standard report but also the user defined PDF report.

In the following graphic, the course “Analyzing Effecitveness in Educational Sytems” is compared with the results of two previous periods.

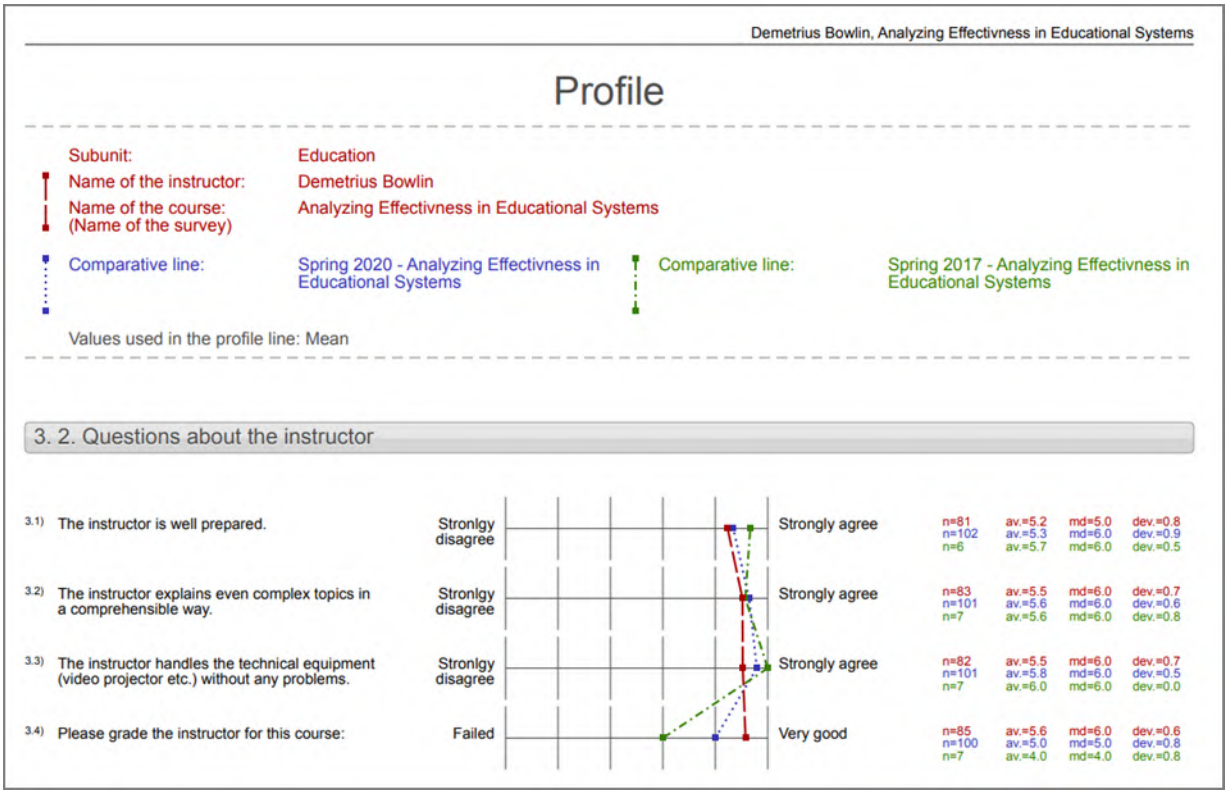


Figure 598: Profile Line Comparison: Example of a Profile Line Comparison with two Previous Periods

Please note, that you define these settings per questionnaire as an administrator as well as a subunit administrator.

Define manual reports for comparison

As well as defining previous periods for the profile line comparison, you can also define manual comparative reports.

> **Note:**
> As the profile line comparison is in the details of a questionnaire, and as such, defined for a particular questionnaire, you must login as (subunit)administrator. Please note, that reports used for comparison have to be created in the report creator in advance.

Again, in the questionnaire details, select in the area “Advanced Settings” the option “Report for comparison” and click on [Edit]. In the following window, under “Define report for comparison”, you can define which report should be used for the comparison.

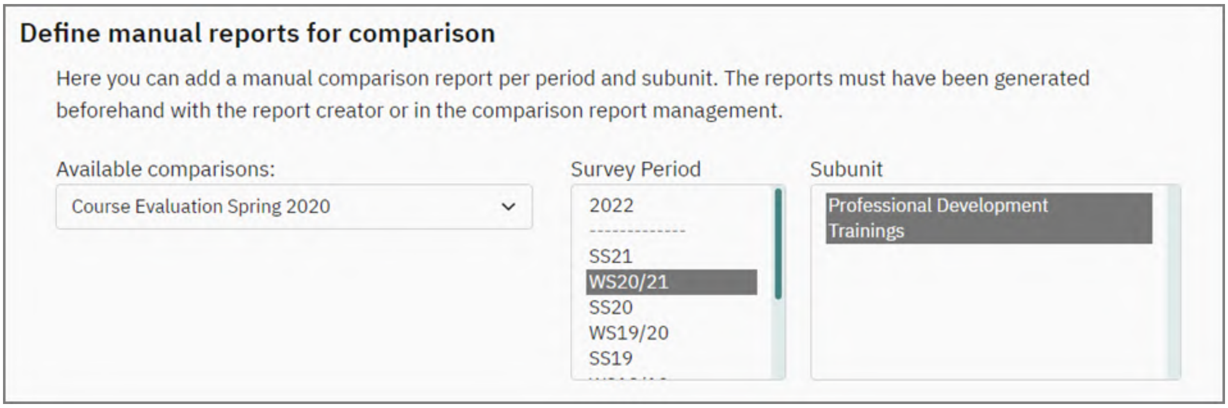


Figure 599: Profile Line Comparison: Define Report for Comparison in the Details of a Questionnaire (Administrator)

Under “Available reports” you will find all reports which

- are based on the current questionnaire
- you have already created in the Report Creator window.

In the comparison report management, you will also find comparison reports for which you have entered data yourself.

In the following example the comparative report “Course Evaluation Spring 2020” is selected. This summary report, which has been created by a report creator, contains all survey results of the summer term 2020.

Once you have selected the comparative report, define in the area “Survey Period”, which period it should be used for. You can only mark one single period!

If, for example, you define here the period Fall 2020, in all PDF reports of the surveys which were created with this questionnaire in Fall 2020, the profile line will be supplemented: they contain additionally the profile line of the summary report “Course Evaluation Spring 2020“.

Additionally, you define for which subunits the comparative report should be used for. As opposed to the survey period, whereby only one period can be selected, in the area of “Subunits” you can define several subunits. To do this, press and hold down the [Crtl] button and click on the desired subunits.

Note:
Please note, that a subunit administrator only has access to his subunit. You can allocate subunits to a subunit administrator in his user profile.

Save your input by clicking the [Add] button. As you can see in the following graphic, your settings are automatically added.

Figure 600: Profile Line Comparison: Report for Comparison was created successfully

If you now access the PDF report for surveys of the subunit “Education” created in the period Fall 2020 with the questionnaire “Train_en2”, as well as the profile line of this survey you will also receive the comparison profile line.

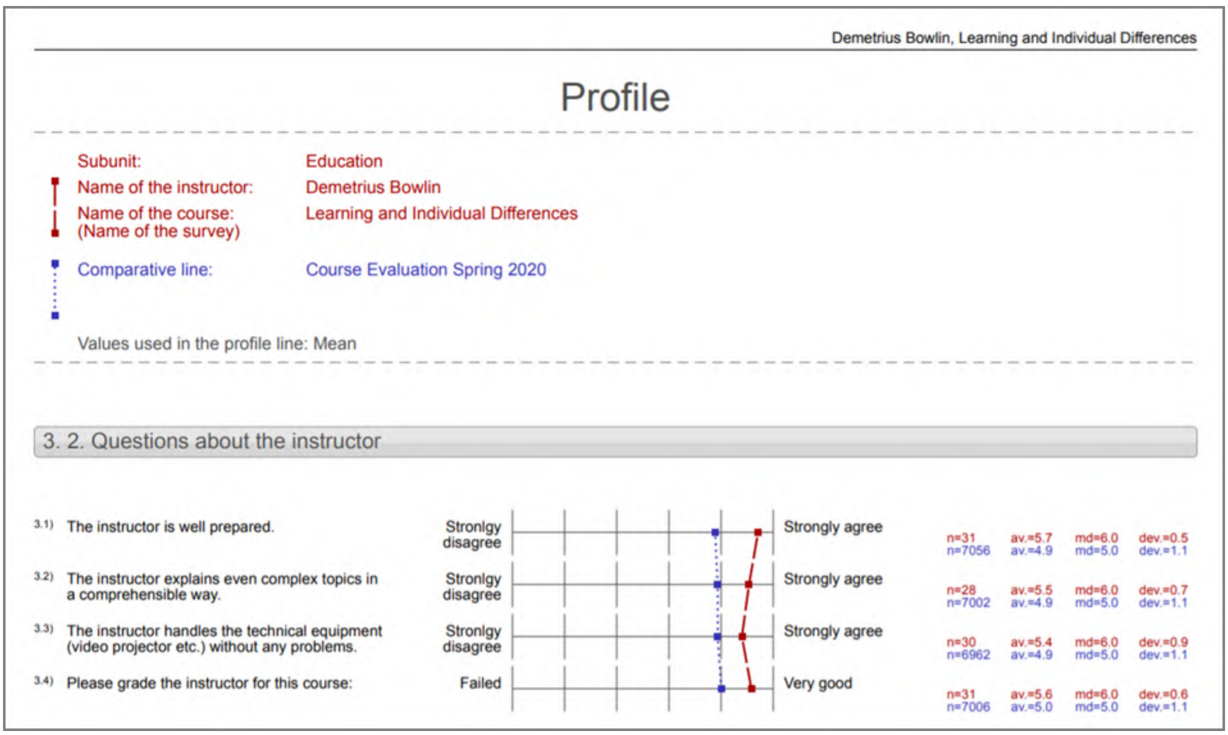


Figure 601: Profile Line Comparison: PDF Report with the Profile Line of the Report for Comparison

Note:
You can define as many manual comparative reports as you may require. In doing so, please note that you can only define one comparative report per survey period and subunit.

Free Entry of Comparison Data

The button [Comparison Report Management] allows you to freely enter your own comparison data for your questionnaire without having to create an evasys report beforehand. This can be useful if you have already collected survey data before working with evasys and want to use it for comparison purposes, or if you want to integrate an external benchmark data set.

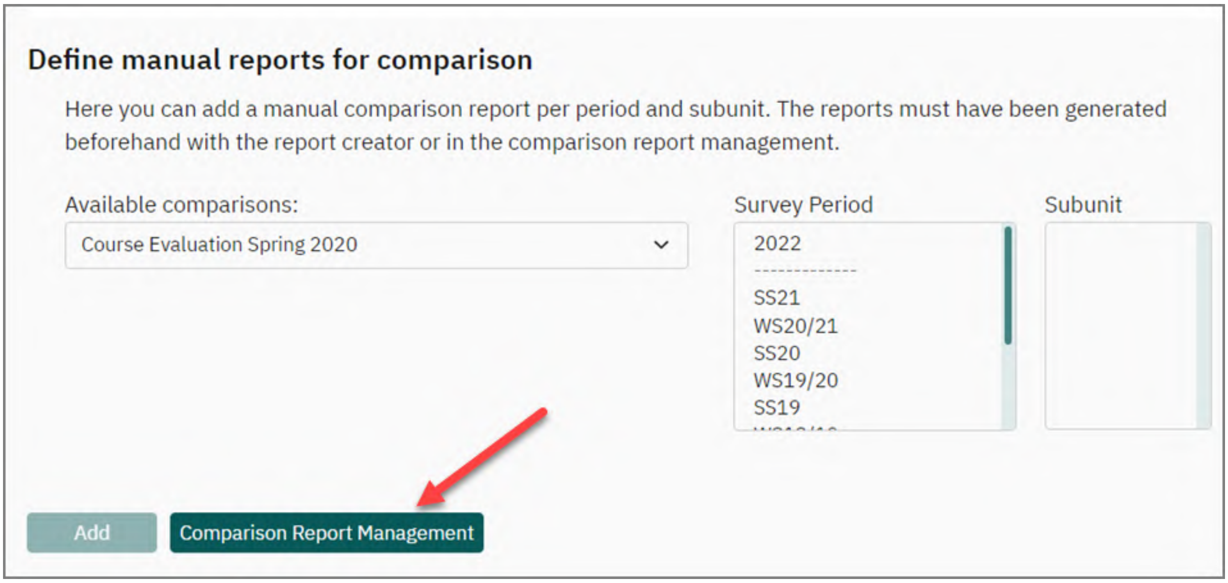


Figure 602: Open Comparison Report Management

If you click [Comparison Report Management], you receive an overview of the available external comparison datasets. As long as you no data has been added, the list is empty. Click on the [New] button to enter a new comparison dataset.

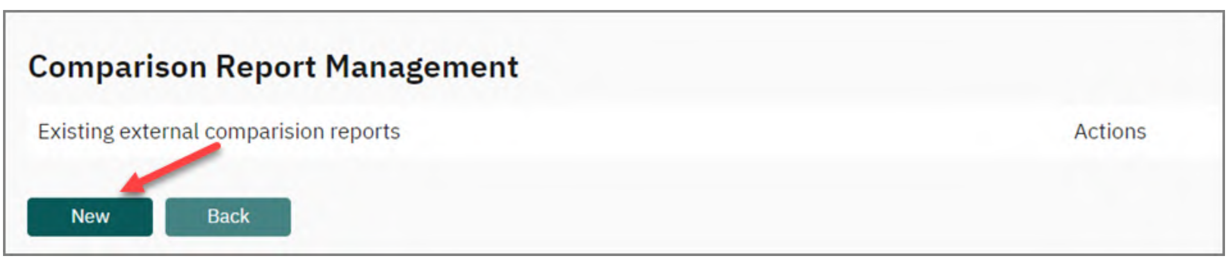


Figure 603: Add New Comparison Dataset

In the following view, all scaled questions of the questionnaire are displayed. First enter a report name and then enter the required comparison data for each question. You can enter the arithmetic mean (av), the median (md) and the standard deviation (dev) for each question. The mean value and standard deviation can be stored with up to two decimal places, the median only as an integer. Not all values need to be defined. You can omit the standard deviation, if, for example, you only have the mean value and the standard deviation available.

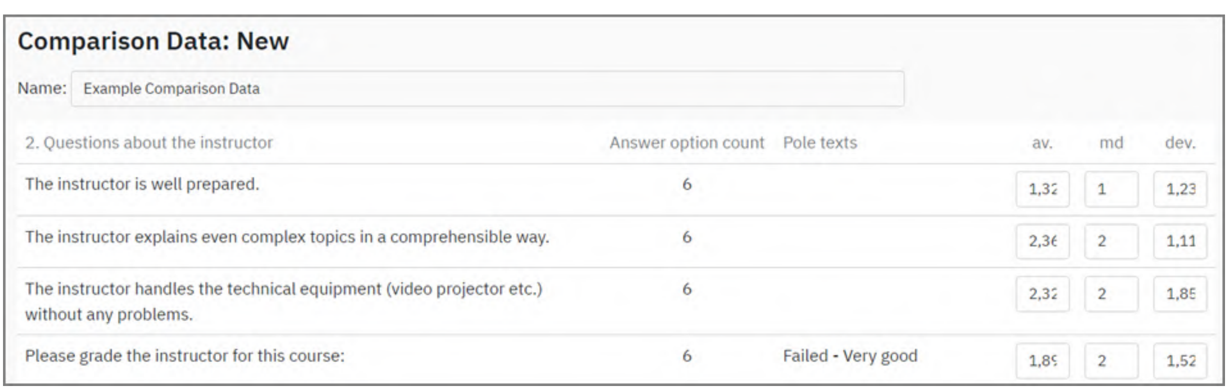


Figure 604: Enter Comparison Data

Click [Generate] at the bottom of the page. The report now appears in the comparison report list. By clicking on the pencil symbol it can be edited later, by clicking on the cross symbol it can be deleted if it is not yet in use, i.e. the report has not been assigned to a subunit.

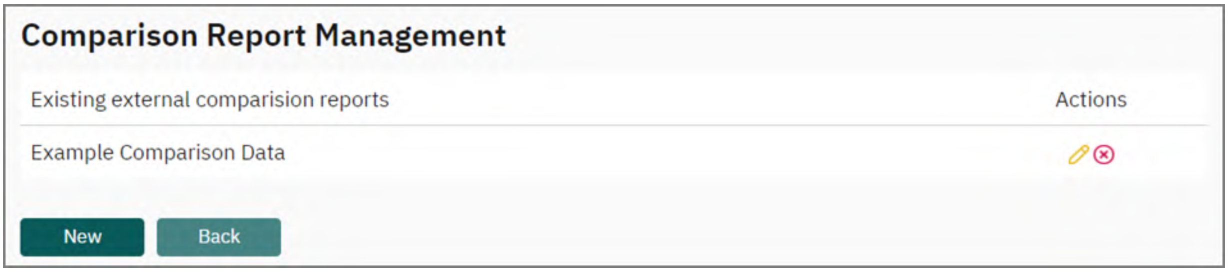


Figure 605: Report in the Comparison Report Management

Click [Back] to return to the menu “Comparison Report“. The newly created comparison report is now displayed in the selection list. As described in the previous section, you can now assign it to a survey period and a subunit.

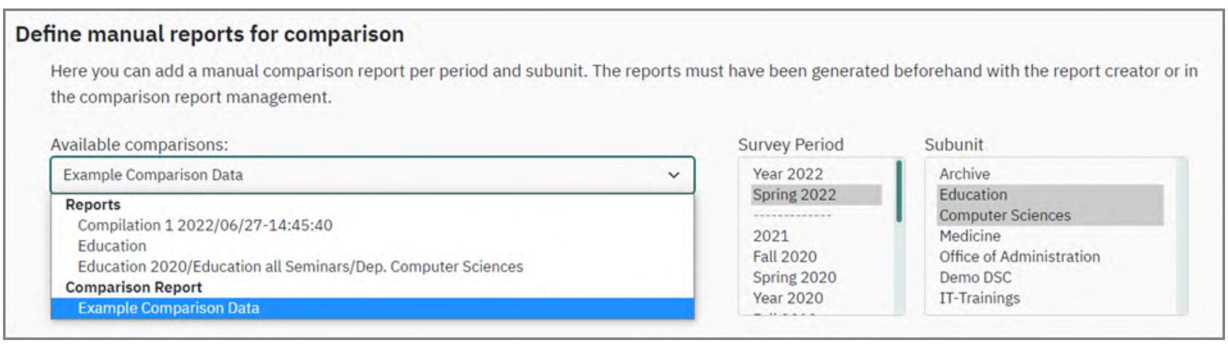


Figure 606: Own Report in the Report Selection

The external comparative data is also available in the survey details of individual surveys based on the selected questionnaire.

Note:
This function is only available for standard surveys. Module surveys are not supported. In addition, the profile line for free indicators is not supported.

Define automatic reports for comparison

The system can automatically generate comparison reports based on the existing survey data and integrate them into the PDF report as a comparison line. Five levels are available for these automatic comparison reports, which can be selected as the basis for the comparison data:

- Organization
- Subunit
- Instructor

- Course Type
- Program of Study

If a level is used for comparison, the system automatically aggregates the required data in the background before calling up or sending the report and displays a corresponding comparison line in the PDF report. In this way, without further action and without having to create an aggregated report in the report creator beforehand, comparisons to all evaluations with the corresponding questionnaire in the same subunit and survey period are added.

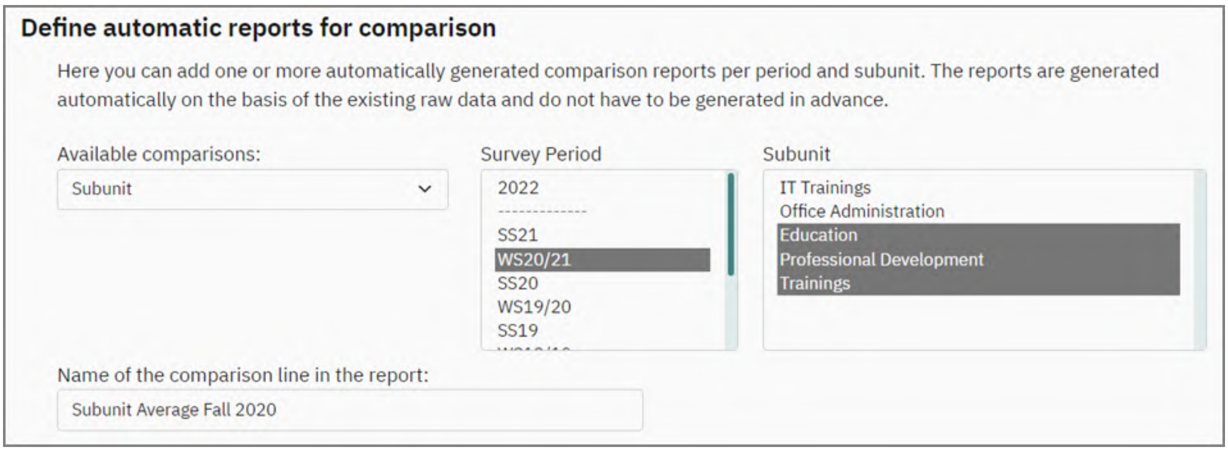


Figure 607: Define automatic comparison report

To set up an automatic comparison report, choose

- the level on which the comparison should take place (e.g. the subunit)
- the survey period in which the comparative report is to apply
- one or more subunits for whose surveys the comparison is to be displayed

In the above selection, it was set, for example, that the overall result for the respective subunit should always be displayed as a comparison line in PDF reports for the subunits education, computer science and medicine in Fall 2020. This means, for surveys in the education department in fall 2020, the total mean of all surveys with this questionnaire in the own department is displayed.

A name must be specified for the comparison line to be displayed in the report, which is then displayed as a label for the profile line. After clicking on [Add], the definition is displayed in a list below the selection area. The comparison report can be deleted at any time. You can also add further comparison reports at any time. A maximum of all five available automatic comparison levels can be added per subunit and survey period.

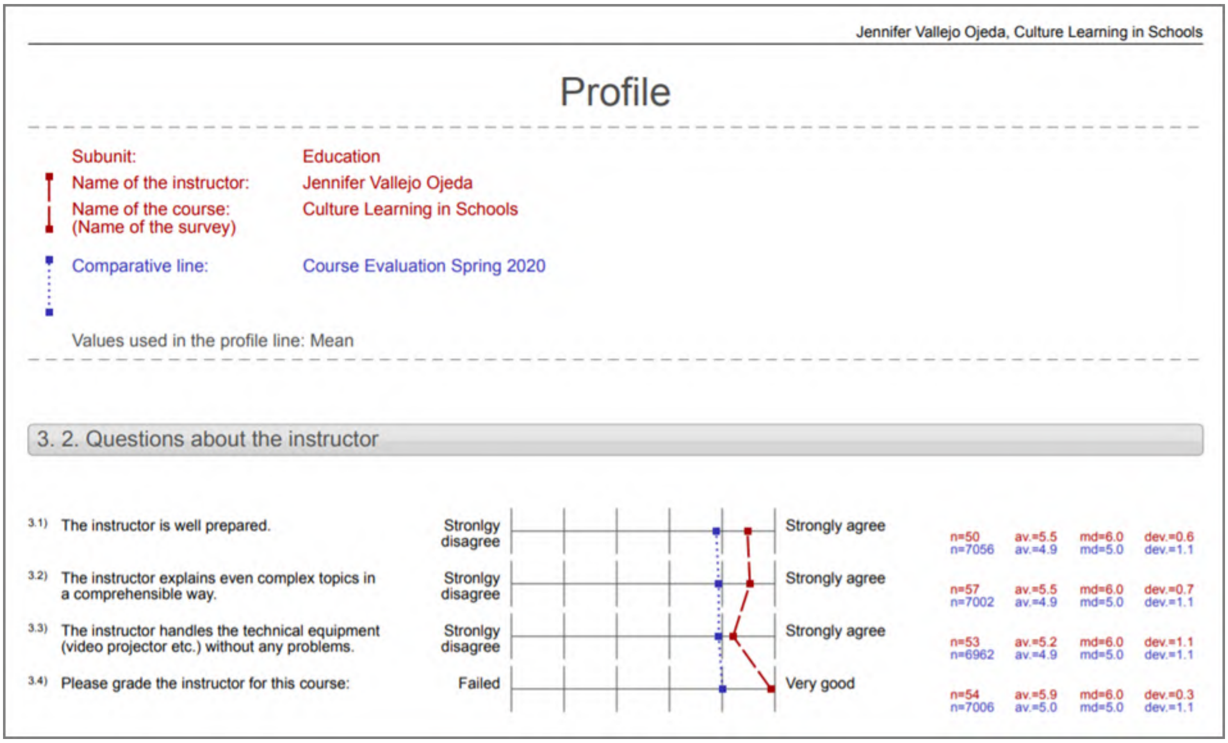


Figure 608: Profile line with automatic comparison report

Note:
The system automatically aggregates all the data available for selection at the time the report is downloaded/sent. If some surveys have not yet been completed or the data collection has not yet been completed, it is possible that the comparison lines show deviations at a later time because the data basis has changed.

5.3. Data Export to Excel/SPSS/Sphinx

For further reports and evaluation you can export the collected data to three different formats. The export function can be used for all of the surveys and reports. In the following you can see a description of the different formats:

CSV Format

CSV stands for “Comma Separated Values” and provides a free text format that is able to be read by all statistical tools as exchange format. One line of a CSV file is equivalent to the content of one questionnaire. The values are separated by a separator. You can define this separator at “evasys Settings/Data Import and Export“; the default setting is a semicolon. The values are also enclosed in inverted commas. One data row contains:

“[Sheet-ID]”;“[Variable 1]”; ... ;“[Variable n]”;“[Timestamp]”

Data from surveys whose questionnaires were created in batch printing with serial numbering additionally receive the batch print ID.

Hint:
If you want to edit the CSV file in MS EXCEL, please do not open the file directly but use the import function instead. Specify "Text" for the data type of the cells, as otherwise, for example, longer answers to open questions could be cut off.

SPSS Format

SPSS is a common tool for statistical analysis and solutions.

Exporting from evasys creates a SAV file, which contains the format of the sheet and all the raw data of the survey/report.

Sphinx Format

Sphinx is a professional statistics solution from France, for which evasys has an interface. After the download you will receive a ZIP file which contains a directory as well as three single files:

[SURVEYNAME].QUE (Sphinx questionnaire)

[SURVEYNAME].OUV (responses to open questions)

[SURVEYNAME].REP (responses to closed questions)

[SURVEYNAME].HYP (Report template, if available)

[SURVEYNAME].BAT (Link to direct display of the Sphinx evaluation report, if report template is available)

In order to use these files you will need to install Sphinx Survey V4.5 or higher on your PC. Double-click on [SURVEYNAME].OUV file in order to start the operation. You can learn more about using Sphinx with evasys in the relevant chapter.

Export of Online Surveys

For online surveys the export data includes a time stamp showing the completion time of every record.

5.4. Definition of the Export Values and Names for Variables

In export, evasys assigns the names of the variables (=questions) automatically. In CSV-export this is unproblematic, because the question text is adopted. With export to Sphinx or SPSS however, no meaningful variable name appears, but an alpha/numerical combination, for example V2_A for the first variable (as question) in the second question group.

You can specify new names for all variables. These are then displayed in the CSV file (thus in Excel), as well as in Sphinx and SPSS, instead of the automatically assigned names

This function is intended to support you in the evaluation with statistic tools.

To rename the variables, go to the details of a questionnaire and in the area “Advanced Settings” select the option “Data export configuration”. Click on [Edit]:

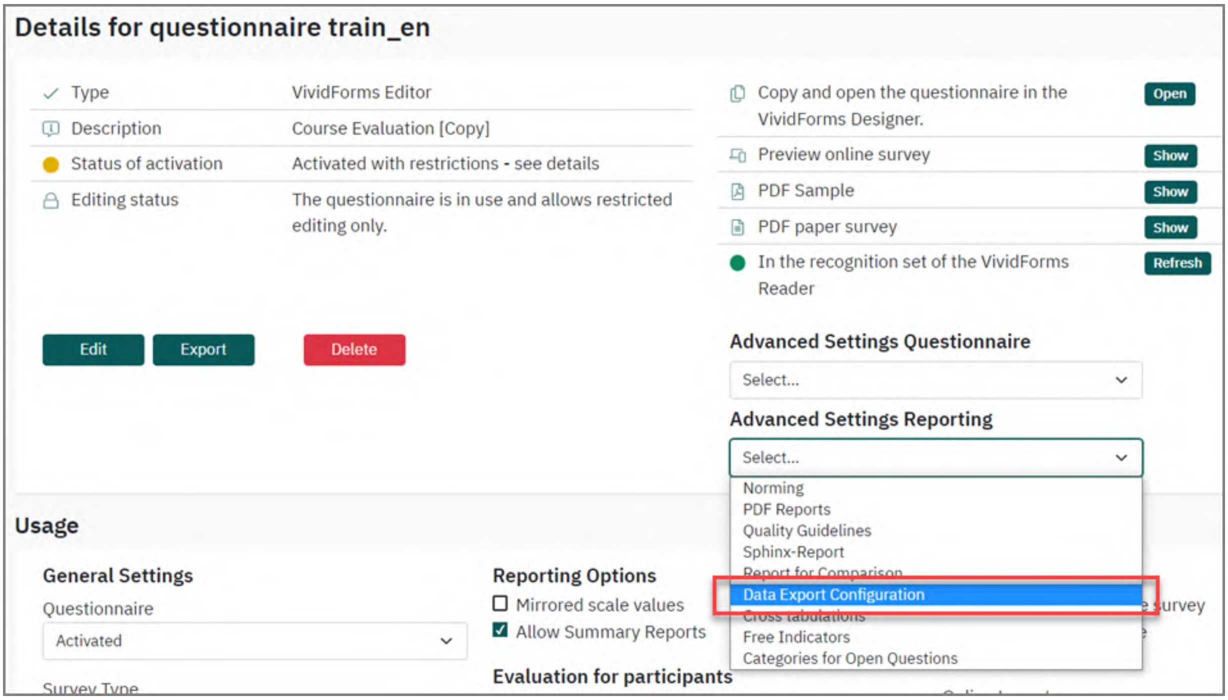
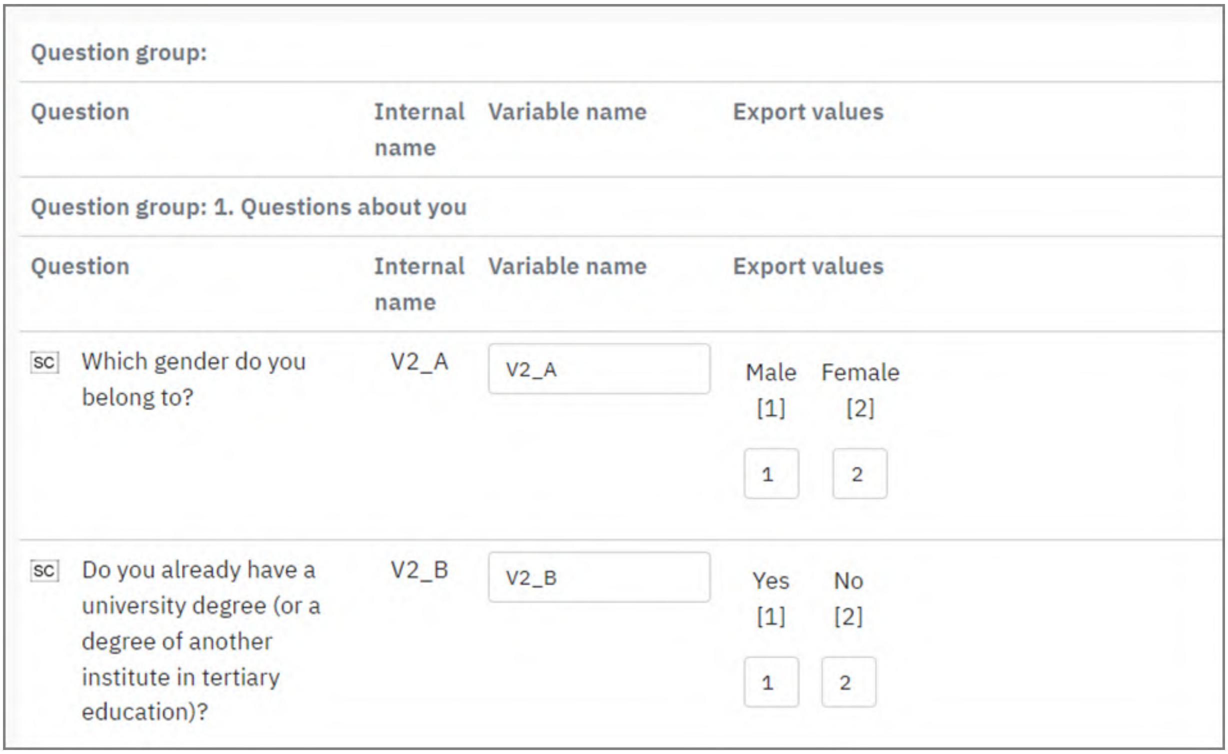


Figure 609: Data Export Configuration in the Details of a Questionnaire

Note:
The allocation of names for variables must be carried out for each questionnaire.

In the window which opens afterwards you have the possibility of defining the names of the different variables:



Question group:			
Question	**Internal name**	**Variable name**	**Export values**
Question group: 1. Questions about you			
Question	**Internal name**	**Variable name**	**Export values**
SC Which gender do you belong to?	V2_A	V2_A	Male [1] 1; Female [2] 2
SC Do you already have a university degree (or a degree of another institute in tertiary education)?	V2_B	V2_B	Yes [1] 1; No [2] 2

Figure 610: Define Data Export Configuration

The first column shows you the types of questions and the question text, the second displays the internal description of the variable. In the third column, you can rename the variable. Please observe the following rules when renaming:

The name

- must begin with a letter (reason: variables in SPSS must begin with a letter).
- may only consist of letters, numbers and the underscore. This means, that other (special) characters also the space bar, are not allowed. Capital and small letters are, however, not important.
- may have 32 characters at maximum
- must contain at least one character. The field therefore, cannot be empty!

In the fourth column the export values are displayed, to which you can allocate new numerical values. Please note, that you can only use numerical values for the export value, no alphabetical characters.

After completing your changes, click at the end of the dialogue on [Save]. Evasys informs you whether the saving of your changes was successful:

Information
Export configuration successfully saved.

Figure 611: Data Export Configuration successfully saved

(Should the variables not comply with the above mentioned rules, an error message will appear).

After your changes have been successfully adopted, click at the end of the window on [Close] to exit the export configuration.

The example questionnaire just processed (Sampl1) shows, for example, in the raw data export via CSV, the following result (SPSS and Sphinx are also possible).

A	B	C	D	E	F
Sheet	Gender	Age	Age	Grade	Term
1	1	6	75	2,9	8
2	0	4	88	1,3	4
3	1	1	61	2,2	6
4	1	3	38	2,7	3

Figure 612: CSV Export of the Raw Data with Changed Names of Variables and Export Values

The variables changed by you and the export values are displayed. In the third column, for example, instead of the usual variable description "V2_B", the newly defined variable name "Age" is displayed. Also, the newly defined export values "0-1" in the area "V2_A" are displayed here instead of the usual export values "1-2".

5.5. Data Export

The menu "Data Export" in the main menu "Subunits" offers different possibilities to export survey data from your evasys system. In three separate sections you can either export the raw data of your surveys, the response rates or selected statistical data. All possibilities are explained in the following.

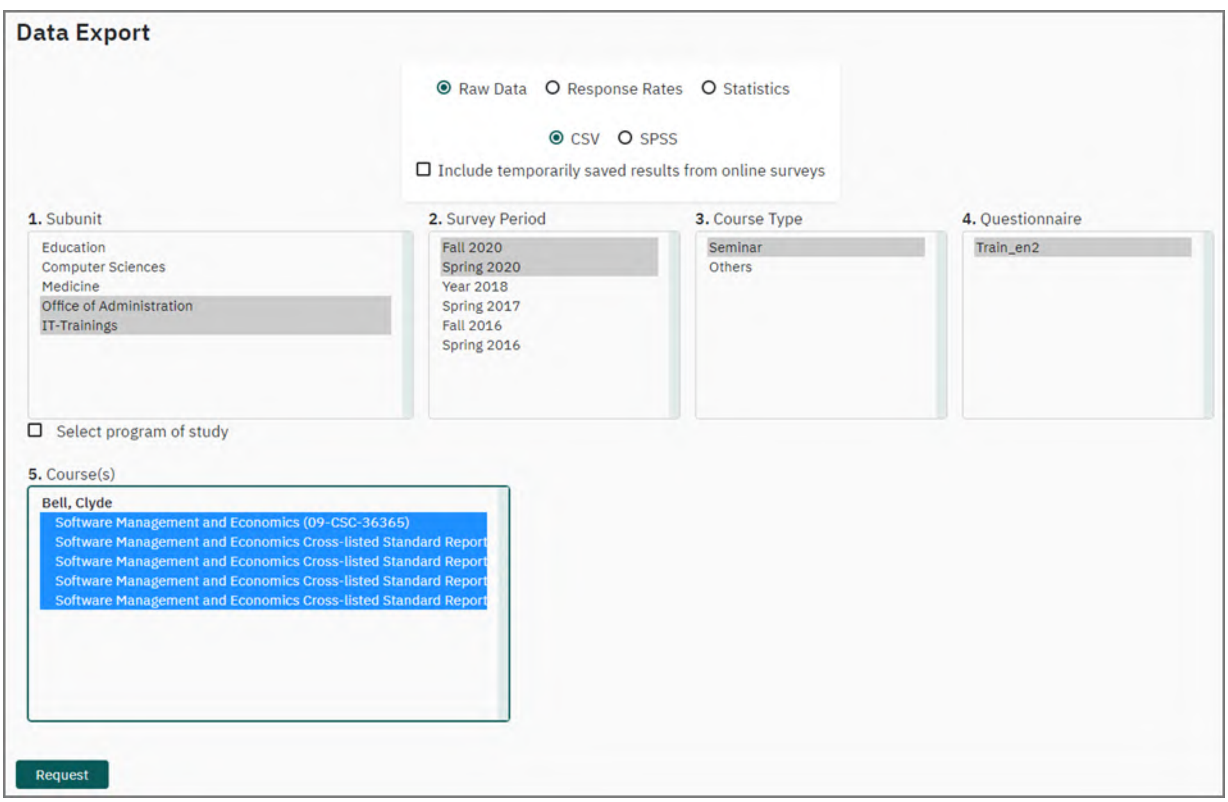


Figure 613: Batch Export

- Raw Data Export
- Response Rate Export
- Export Statistical Values

5.5.1. Raw Data Export

In the upper part of the window, select the option “Raw Data” and the export format (CSV, SPSS, or Sphinx, if licensed) and then select the subunit, the period, and the questionnaire you wish to use from the list. This prevents evasys from exporting all data.

For the batch export, three export formats are available:

CSV: A text file with the raw data of all selected surveys is exported (including the course data).

Sphinx (only if licensed): A ZIP file with the questionnaire contents, the raw data of all selected surveys (including the course data) as well (optional) an evaluation template is exported.

SPSS: A SAV file with the questionnaire contents as well as the raw data of all selected surveys (including the course data) is exported.

In the case of Sphinx and SPSS, a special feature offers the ability to export across several questionnaires. In this way, survey projects consisting of several questionnaire types, such as 360°-Feedbacks, can be easily exported in a single large file and processed with the Sphinx-Statistic-Workbench or SPSS.

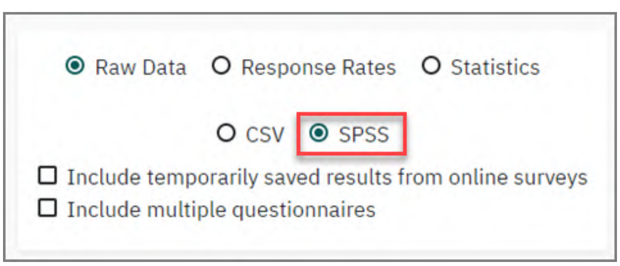


Figure 614: Batch Export of Several Questionnaires (Sphinx and SPSS)

Tip:
When activated, cached survey data can be retrieved in case of online surveys. For more information see chapter B 3.15.8. “Access Data of Temporarily Saved Questionnaires”

5.5.2. Response Rate Export

To export information on the response rate for one or more surveys, select the option "Response Rates." The export can include surveys with several questionnaires, provided this option is activated.

Filter the information to be exported by selecting the subunit, period, course type, and questionnaire after selecting the course, and click [Request].

A CSV file will be downloaded which shows the number of participants, the number of responses, and the response rate in percent for each course selected.

Enrollment Number	Number of Responses	Response Rate Percentage
25	6	24
150	27	18
25	6	24
80	26	32,5

Figure 615: Exporting Response Rates

5.5.3. Export Statistical Values

With the help of the selection “Statistics2 you can export selected statistical values from the system for one or more surveys at a time. The export formats CSV and SPSS are available.

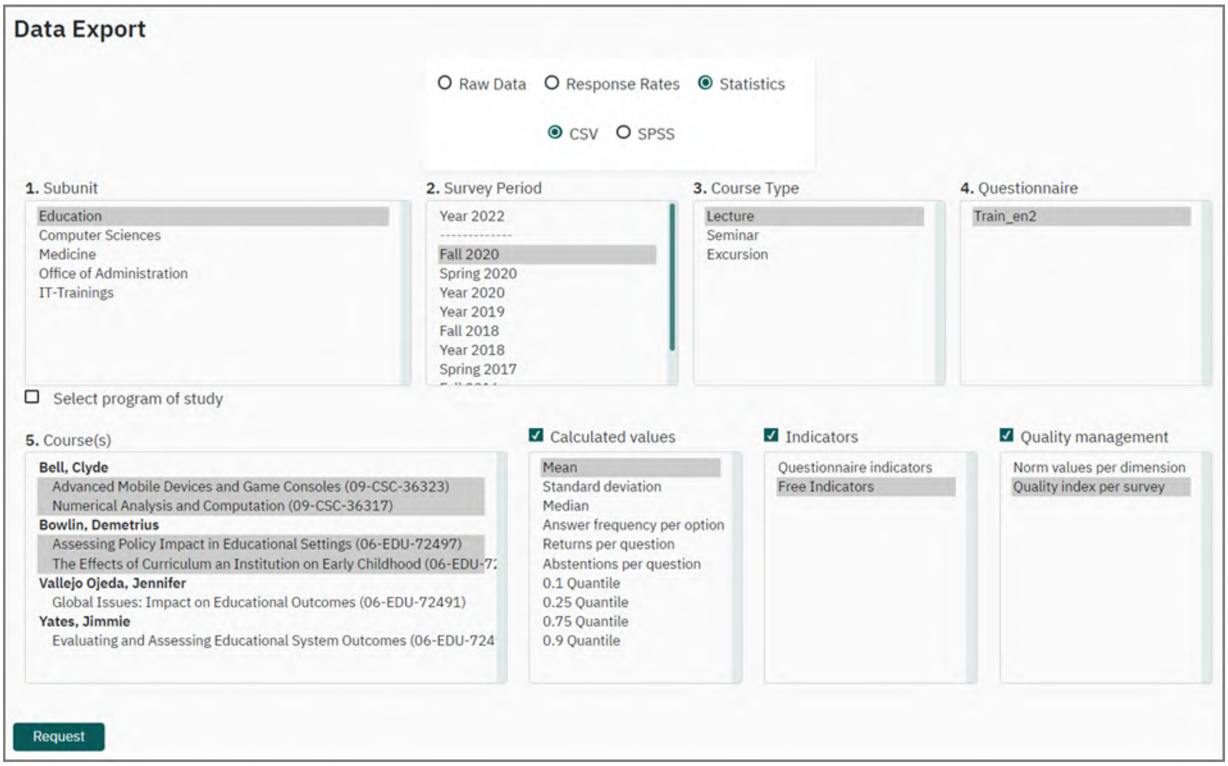


Figure 616: Export statistical values

For all closed questions you can download the following calculated values:

- Mean
- Standard Deviation
- Median
- Answer frequency per option
- Responses per question
- Abstentions per question
- 0.1 Quantile
- 0.25 Quantile
- 0.75 Quantile
- 0.9 Quantile

For questionnaires you have defined indicators for (either question group or free indicators) you can export the available indicators:

- Question group indicators (contains global index and single indicators)

- Free Indicators

In the section Quality management, you can export the results of norming for questionnaires you have defined norms for, and the quality indices for each survey:

- Norm values per dimension
- Quality index per survey

Please note the following:

- You can only export data for one questionnaire at a time but for as many surveys with this questionnaire as desired
- You can export one or more values (e.g. mean and standard deviation). However, please note the depending on the number of questions and answer options on the questionnaire and of the number of selected values the number of columns in the export file can be very high. We recommend not exporting too many values at a time. If the number of selected values combined with the questionnaire is too high, a warning message is shown. In this case please reduce the number of selected values and export the data in separate files.
- Information in the section Calculated values is available for all surveys with all questionnaires. Indicators and Norm values can only be exported if you have defined indicators and norms for the selected questionnaire. For further information compare chapter B 5.1. “Indicators” and respectively chapter B 6.1. “Norms”.
- Additionally, the raw data and the amount of returns are included in the export of the statistical values.

6. Phase 5: Quality Management

- Norms
- The window with the details of the created percentile rank norm appears.

6.1. Norms

In evasys, you can add norm values for questionnaires. Thus, you can more easily compare and interpret results from surveys which are based on this questionnaire.

There are two different options to add norming values to your questionnaire:

- Norming as a mapping on a normal distribution curve
- Percentil rank norming

The classic normalization is interval-scaled, while the percentile norm are rank-scaled.

6.1.1. Standard Score Norming

If norms have been defined for the corresponding questionnaire and if they have been activated in the PDF report settings (menu “System Settings/Report Settings/Configuration/Show norm values”), an overview over the values of the indicators with the corresponding norm values and a normed profile line is displayed in the section “Overall indicators” at the beginning of the report.

Interpretation is made easier with colored icons that signal if a result is to be interpreted as good or bad:

 Positive result

 Neutral result

 Slightly critical result

 Critical result

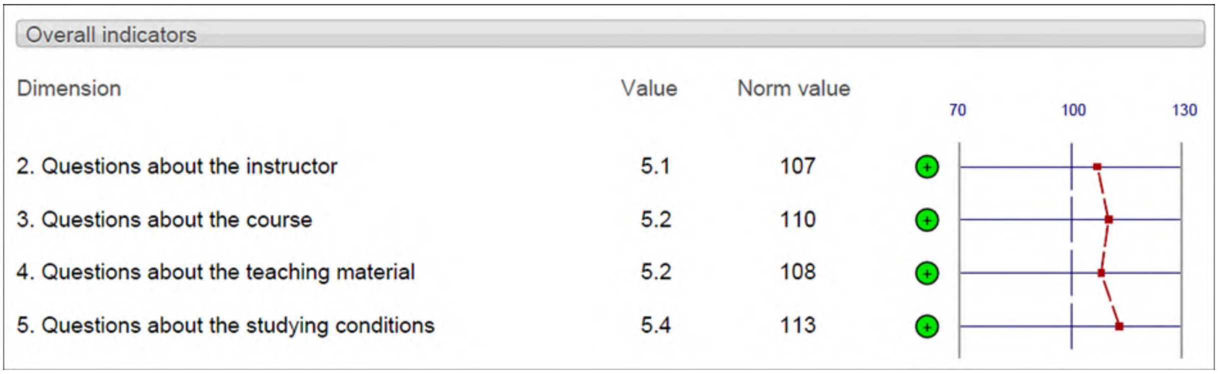


Figure 617: Normed Profile Line for Indicators

In addition, a detailed profile line can be activated in the PDF report which shows the norm values for all questions of the questionnaire ("System Settings/Report Settings/Configuration/Show normed profile line"). This is displayed in the PDF report after the analysis of the individual questions.

As norm basis you can use averaged data from surveys you conducted in the past with the same questionnaire. You can add these norm data (mean values and standard deviations) for the individual questions of the questionnaire manually or you can have them converted automatically from a summary report that was created by a report creator. This can be e.g. a summary report for a subunit, or similar.

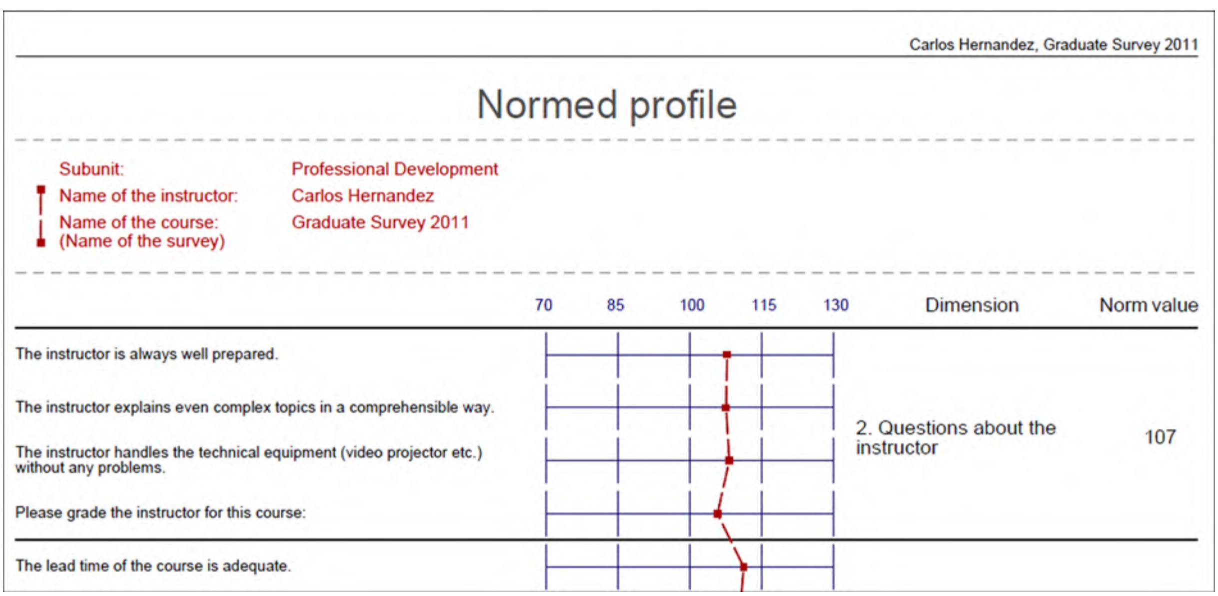


Figure 618: Normed Profile Line for each Scaled Question of a Questionnaire

In addition to norming survey results, individual message texts for below average, average and above average results can be added to the results. These texts can be accessed by instructors via a link in the PDF report. Text building blocks are used to create individual message texts based on the results achieved in a given evaluation.

The norm profile lines and message text functionality were developed in collaboration with Dr. Heiner Rindermann from the University of Magdeburg.

For more information on the calculation of norms please see chapter C 8. "Norming".

Definition of Norm Values for Questionnaires

In order to use the functionality of norm profile lines, the option (System Settings/ Report Settings/Configuration/Show norm values) must be activated.

The option “System Settings/Report Settings/Configuration/Show recommendation text” gives instructors the possibility to generate a recommendation document through a link in the PDF report.

In the details of a questionnaire you can choose in the drop-down-menu in the area “Advanced Settings” the option “Norming”. After marking the option “Norming” click on the button [Edit].

A sub window appears in which the norm value can be entered.

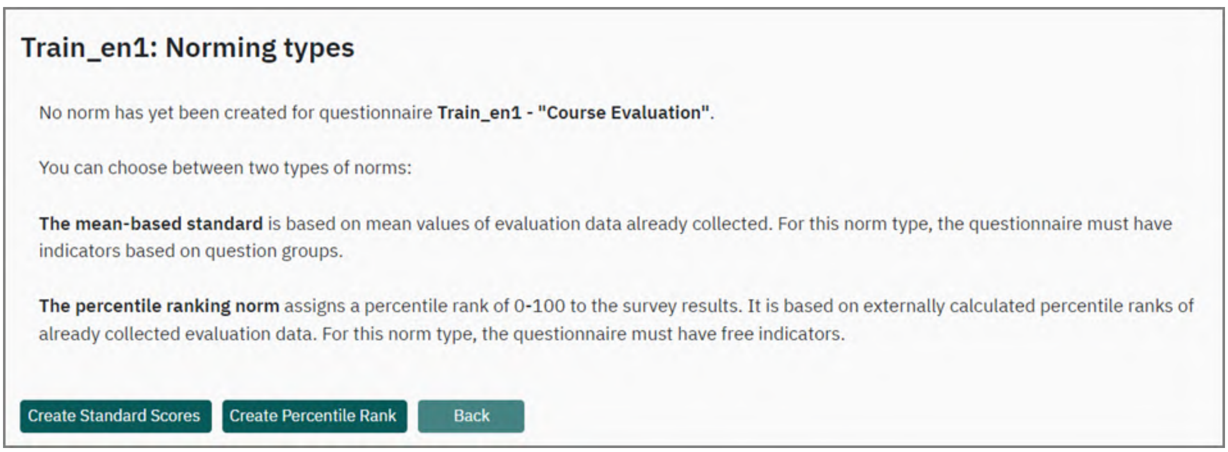


Figure 619: Activate Norming

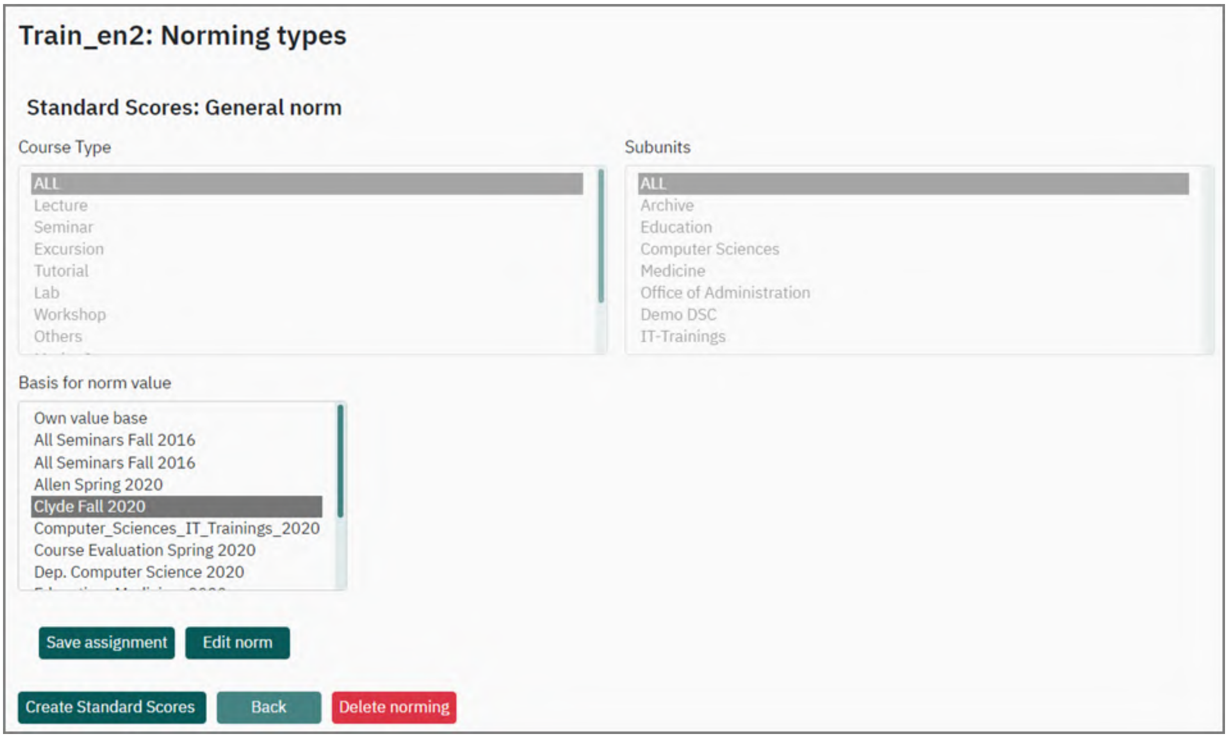


Figure 620: Norming: Settings

In the table displayed you can now set for all the dimensions (indicators) as well as items (only scaled items are permissible) norm values and analysis rules.

Figure 621: Norming: Edit

Whether results are to be seen as positive must be set for each dimension, e.g. for methodology and structure, above average; for redundancy, average; for anomie (lack of discipline) below average.

At the right-hand side of the screen you will see the average as well as the standard deviation of the comparative group. This is repeated for the complete contents of the questionnaire.

In the column “recommendation text” three text building blocks can be placed, which should be displayed depending on whether the results are above average, average or below average.

At the left using checkboxes you determine whether in addition to the dimensions there should also be text building blocks for individual items.

Example: Atmosphere Dimension

Above average score:

Congratulation! Your course is considered by your students/participants to have an above average positive atmosphere (friendly manner with students/participants, cooperative, instructor is open). Particularly in courses with interactive teaching is this an important aspect.

Average score:

Average score results in teaching are not bad, since most courses have been give evaluated as good. (on a raw value scale between 1 and 7 at 5). So this is at least a satisfactory score! How could you continue to improve the atmosphere as judged by students/participants (friendly manner with students/participants, cooperative and instructor is open)? Particularly in courses with interactive teaching is this an important aspect […]

Below average score:

Comparative norms always place 49.99% of the values under the average and 49.99% above. But for norm values below 85 you should definitely take action. It is important not to be discouraged or to make those circumstances you can't change responsible. The best attitude would be to use this score as an impulse to continue to improve your teaching!

How can you continue to improve the atmosphere as judged by students/participants (friendly manner with students/participants, cooperativeness and instructor is open)? Particularly in courses with interactive teaching is this an important aspect […]

As an alternative to manual entry of norm values you can also make use of existing evaluations that you have already created with the user type report creator.

In the section “Edit norming types” click on the button [Edit].

In the upper part of the screen you will see a list of the available norm types, which cannot be deleted. This total norm is generally valid unless you create a special sub-norm.

You can now give the total norm a norm value basis by selecting one of the reports shown in the list in the area “Assignment of the norm type total norm”. It is not possible to limit the total norm to courses or subunits.

In order to create sub-norms, enter the name of the sub-norm in the list “norm types” and click on [New]. The assignment area for the new sub-norm now appears. You can now select all of the course types and subunits as well as the corresponding norm value basis valid for this sub-norm.

6.1.2. Percentile rank norming

In the percentile rank norming, the evaluation results of the surveys of a comparison group are divided into 100 ranks. A higher percentile rank is the better. A percentile rank of 100 means that your own course was better than everyone else. A percentile rank of 50 means that half of the courses were rated better, the other half worse.

In the report, the results are color-coded as follows:

0-5: red, very negative

6-35: yellow, negative

36-65: gray, neutral

66-95: green, positive

96-100: green, very positive

To define percentile norms for a questionnaire, no other type of norms may yet have been created for the questionnaire. In the details of the questionnaire in the “Advanced Settings”, select the “Norming” entry and click on the [Edit] button.

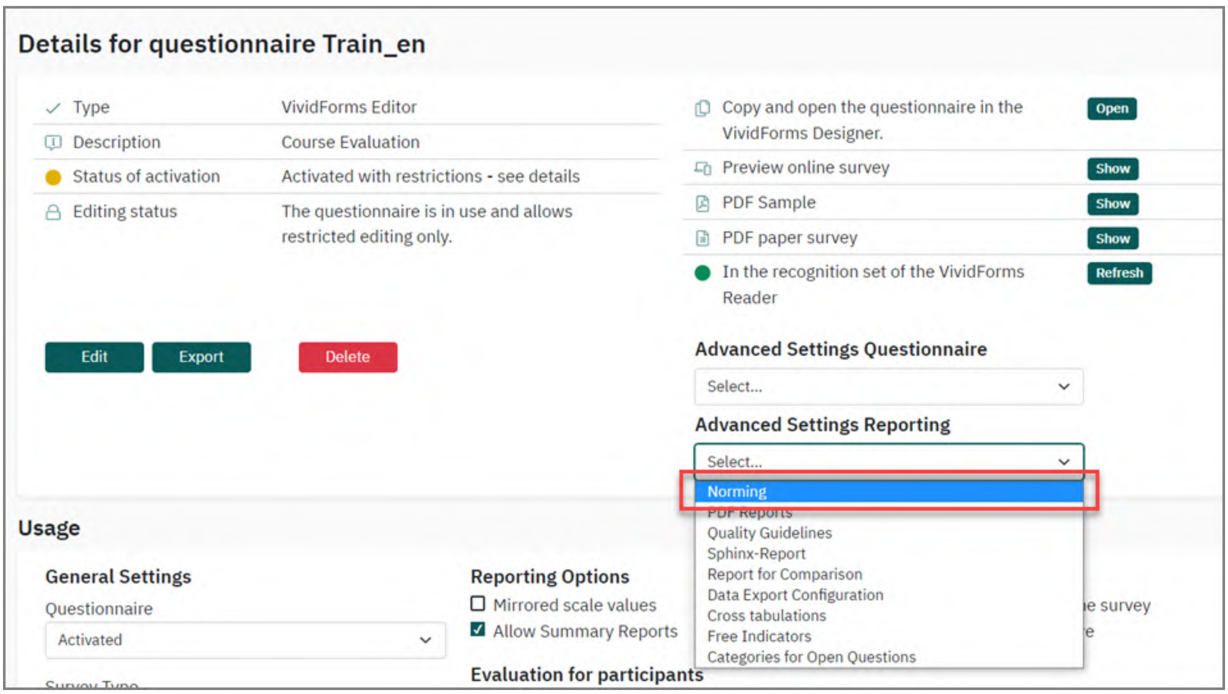


Figure 622: Norming

If a standard score norming is already defined for the questionnaire, you must first delete it before you can create percentile ranks.

Afterwards you will get to the selection window and can click on [Create Percentile Rank] to create percentile ranks.

Note:
Percentile ranks are based on free indicators. Before creating percentile ranks, please make sure that your questionnaire contains free indicators. For more information on free indicators, please refer to chapter B 5.1.5. "Free Indicators".

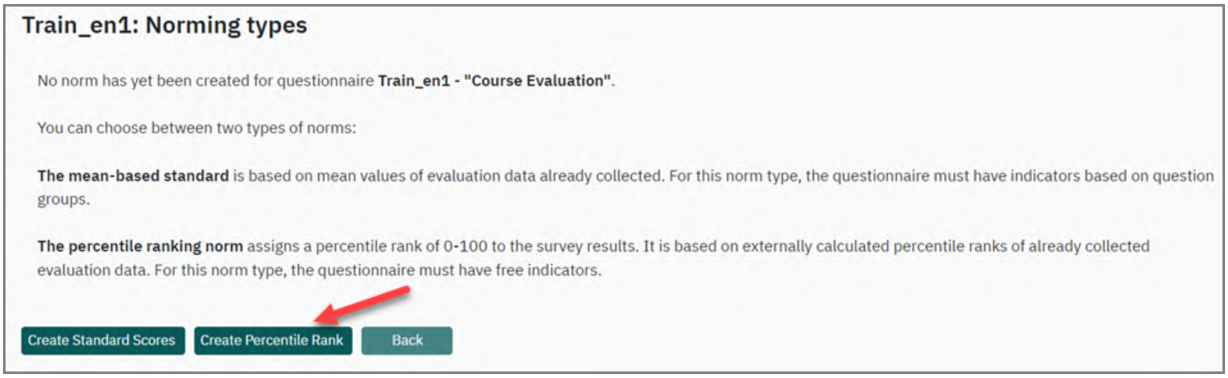


Figure 623: Create Percentile Rank

The window with the details of the created percentile rank norm appears.

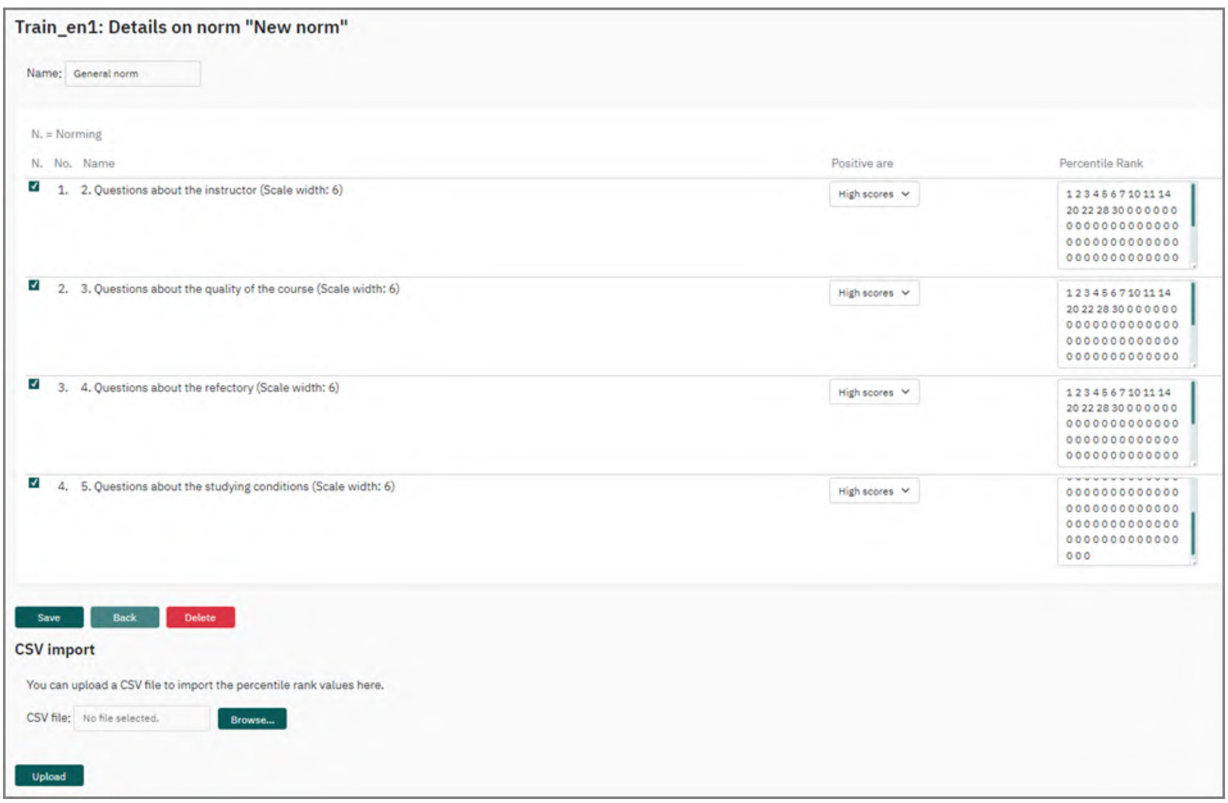


Figure 624: Percentile Ranking Details

The [Edit norm] button opens the mask for input or import of the individual percentile rank values.

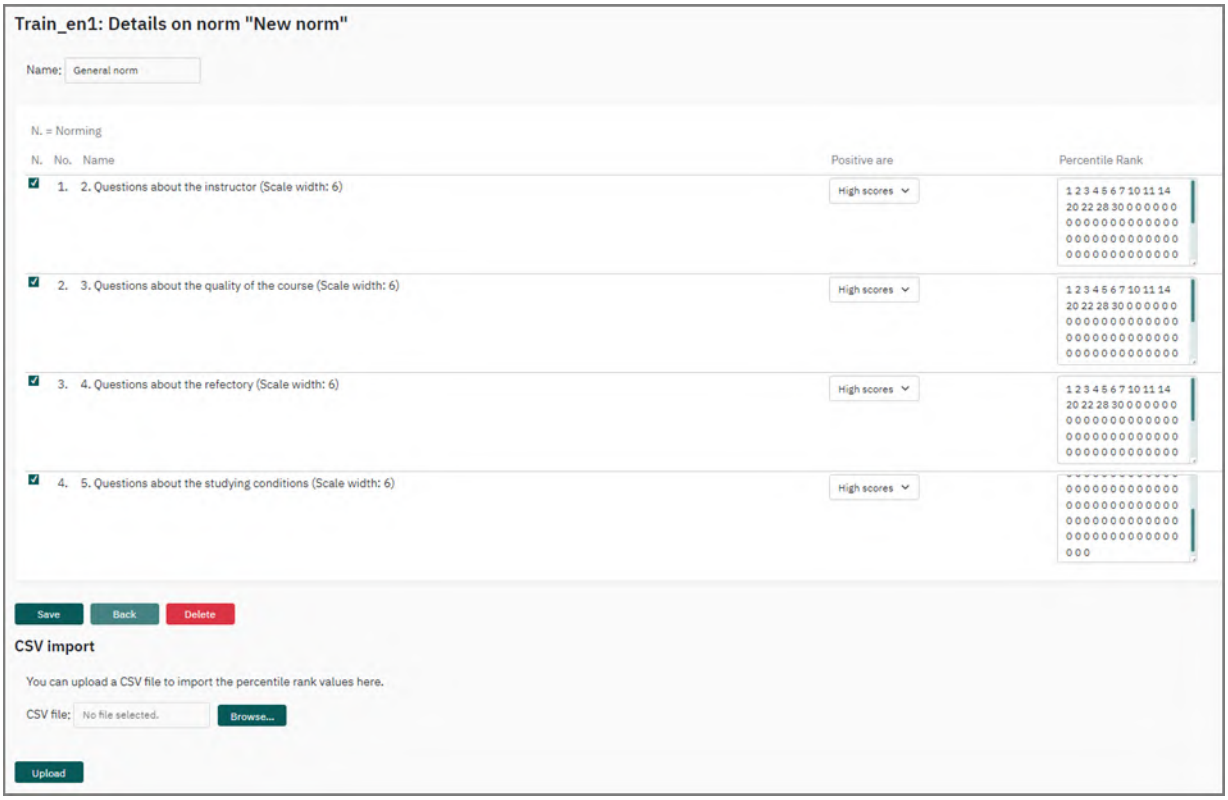


Figure 625: Edit Percentile ranking values

Here you can enter the values for the individual percentile ranks. The scale width is divided into steps with a length of 0.05 and each step is assigned a percentage rank. For further information on the calculation of the percentile ranks, please refer to chapter C 8. “Norming”.

For each dimension you can decide, whether high or low values are positive

For example, you must make 81 assignments for a 5-point scale (4/0.05 = 80 plus the scale end value => 81 values). If a 6-point scale is be used, there would be 101 values.

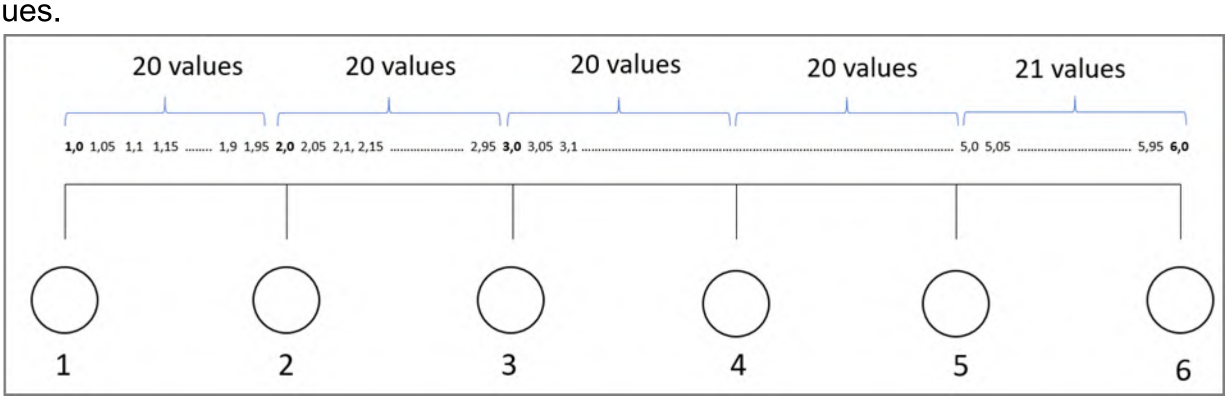


Figure 626: Scale intervals for percentile ranks

CSV Import

Alternatively, the values can also be imported using a CSV file.

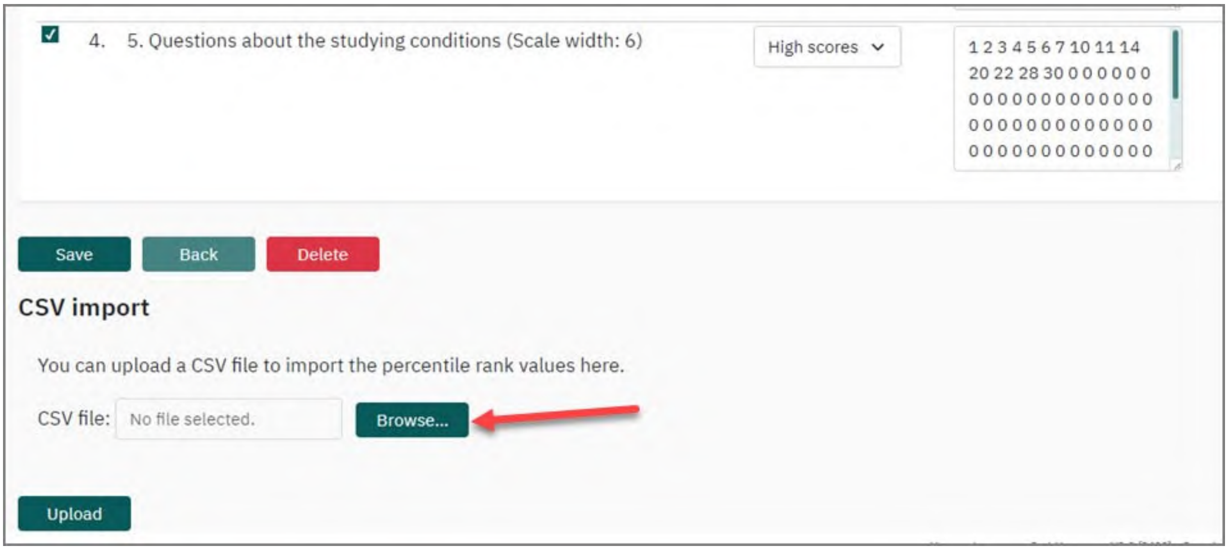


Figure 627: Upload percentile ranks

The CSV file must be formatted as follows:

Column 1: Number of the indicator

Column 2: Mirroring yes/no: If a 1 is entered here, the following values are inverted once, thus exchanged in their order. The first is the last, the second the second last and so on.

Column 3-x: The values to import

If there is no number in the 1st column of the 1st row, this row is recognized as a heading and ignored for the import.

If a line does not contain exactly the right number of values, the import is rejected. If this occurs even though the correct number of values is stored, this could be an indication of an incorrect separator in the CSV file.

Evaluation

If a percentile rank norm is stored for a questionnaire, the ranks can be displayed in the PDF report. Please note that the display of the normed indicator overview must be activated in the PDF report settings.

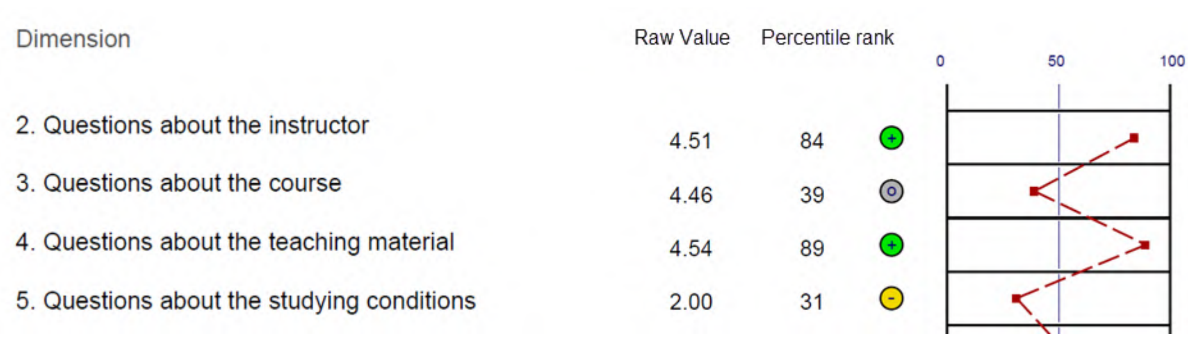


Figure 628: Percentile Report

For each dimension/indicator, the raw value and the percentile rank is shown. Additionally, the profile line supports the results with a graphical representation. Color lights help to interpret the results.

You will find more informations about the percentile ranking in chapter C 8.2. “Percentile Ranks”

6.2. Quality Guidelines

With quality guidelines you can define minimum standards for questions in a questionnaire that have to be reached by survey responses.

Note:
Please note that quality guidelines are only available for scaled questions.

By using such an overview, executives within an organization, such as a dean, are able to put together and assess a number of evaluated courses and access detailed reports if desired.

The (subunit) administrator sets quality guidelines for a questionnaire by allocating a weight and a threshold value to each question or question group that will subsequently be used in the calculation of a quality index. For an evaluated topic or course this quality index can be between 0% and 100%.

- Principle of Weighting of Quality Guidelines
- Setting Quality Guidelines
- Converting Indicators into Quality Guidelines
- Converting Norms into Quality Guidelines
- Display quality guidelines in the PDF report
- Use of QM Views
- Definition of Special Search and Table Configurations
- Report Dispatch for Quality Management
- Automatic Notification for deviant Quality Index

6.2.1. Principle of Weighting of Quality Guidelines

The weighting of the quality guidelines is performed in two levels. First, each quality guideline represents a definable part of 100% over all quality.

Second, each quality guideline contains target values for one or more questions, which in turn have a weighting for this guideline.

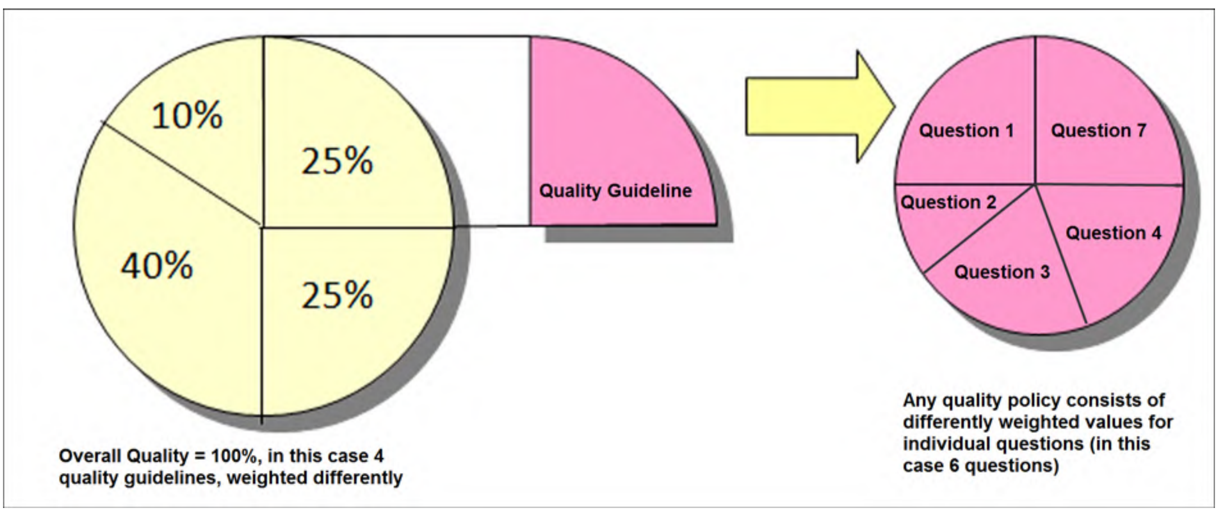


Figure 629: Structure of Quality Guidelines

6.2.2. Setting Quality Guidelines

Quality guidelines are set in the questionnaire details. Choose the option “Quality Guidelines” in the drop-down menu “Advanced Settings” and click on [Edit].

Any quality guidelines (or their question groups, respectively) that have been already defined appear in the list. These are one or more questions that have individual weights attached as well as a group weighting for the quality guideline. Existing quality guidelines can be edited or deleted. One way to set up new quality guidelines is to set them up manually via the button [New].

Note:
Please bear in mind that the mirroring of scale values (in the questionnaire details) does not affect the calculation of the quality guidelines. Therefore, they always need to be calculated on the basis of the internal scale values (from 1 to n, from left to right).

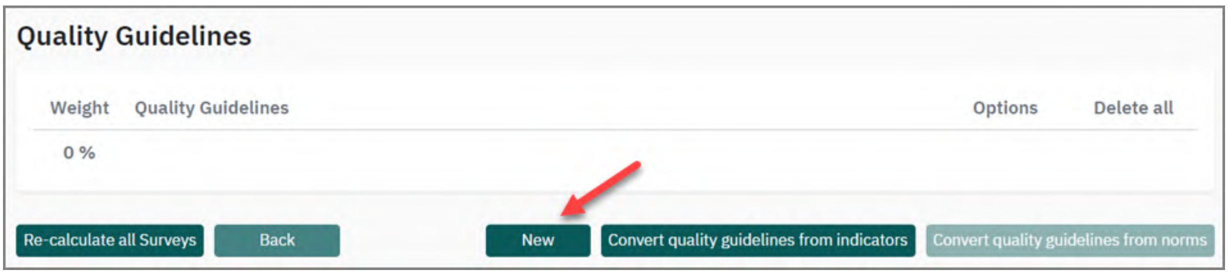


Figure 630: Button “New” to Set Up New Quality Guidelines Manually

In the view that opens, a name and description have to be entered and a weight has to be assigned in relation to the overall quality index. The weight defines the maximal possible deduction in percent that this guideline can have on the overall quality index.

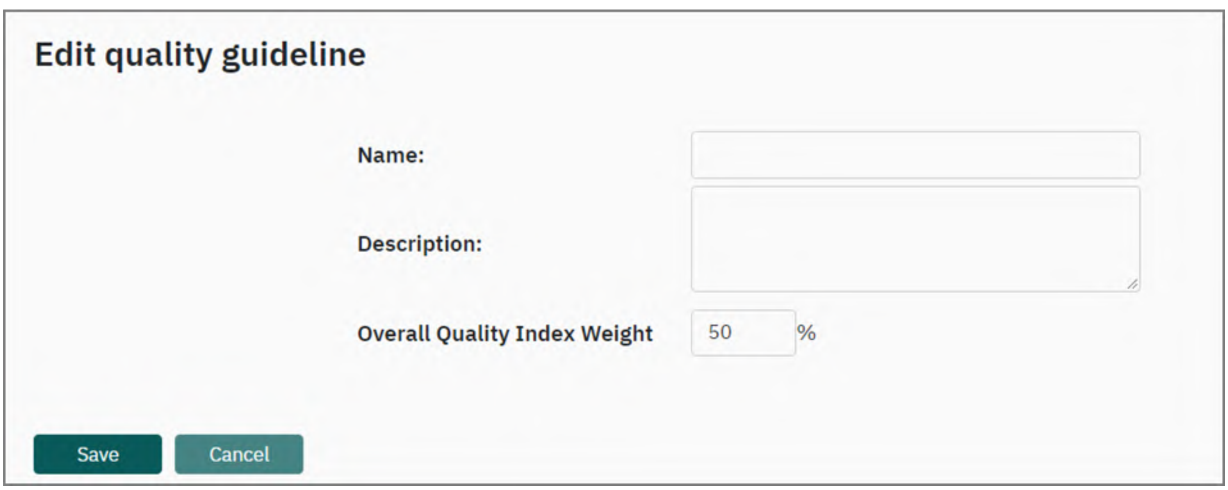


Figure 631: Edit Quality Guidelines

The quality guideline is saved with [Save] and subsequently, questions can be added to it. Usually, questions on one topic area are combined in a quality guideline.

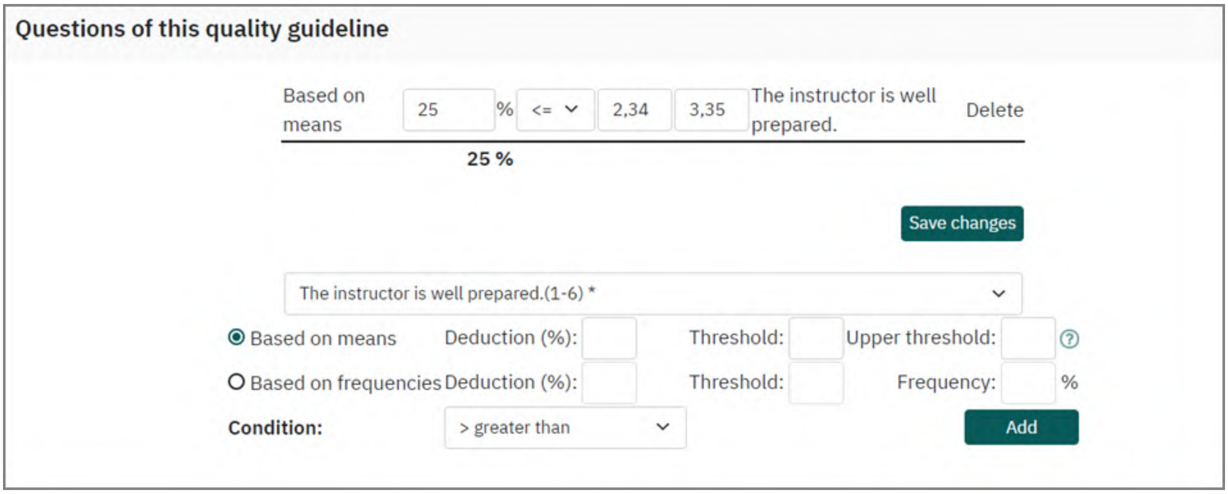


Figure 632: Definition of the Quality Guideline: Adding Questions

You can set up quality guidelines based on averages or based on frequency. Both types of guidelines can even be combined within one quality guideline and for the same question. In this case the worst result determines the traffic light color in the PDF report.

In addition to this, quality guidelines can be set up without defining them manually, by directly converting them from indicators or from existing norm values of the questionnaire. The following subsections explain these options in more detail.

Note:
Both the threshold values and the weighting in percent of the individual questions for a quality guideline can be changed anytime after setting it up. In order to do this, enter the new values and click on [Save changes].

Average-Based Quality Guidelines

In the example above, the question “The instructor is always well prepared” is defined as having a weight of 20%, as well as a lower value of 2.34 and an upper value of 3.35. In addition, smaller values are defined as positive. In this case the question is scaled, with values from 1 (definitely agree) to 5 (definitely disagree).

If the average value for this question is lower than 2.34, than the goal has been reached. However, if the average value for this question is above 2.34, then points are deducted, beginning with 0% and increasing linearly, depending on how far over 2.34 the average is. Once the question “The instructor responds adequately to student questions and concerns” reaches an average higher than 3.35, a full 20% is deducted.

If other questions that belong to the guideline get a total weight of 80%, it is possible to reach a maximum deduction of 100%. This would mean that the deduction from the overall quality index set for this guideline would come to full effect. The extent of this deduction is determined when the quality guideline is created.

Example Calculation, when Higher Values Are Better:

In the following example, a scaled question with a 6-point scale “The instructor is *always well prepared" was assigned a lower threshold value of 2.34 and an upper threshold of 3.35. It was also determined that higher values are better.*

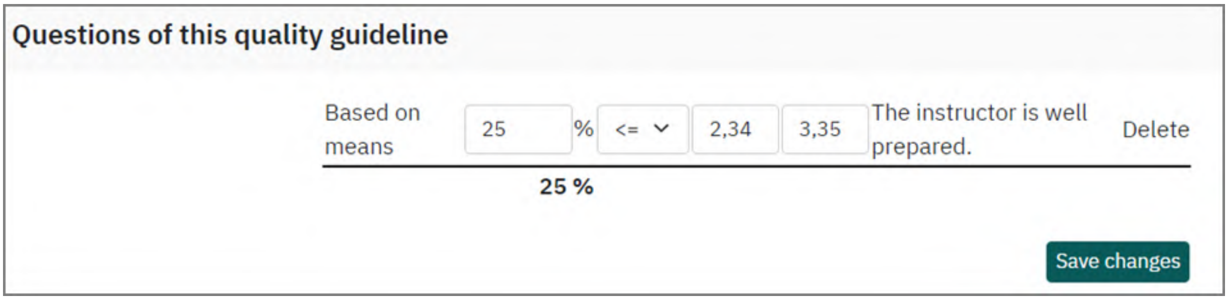


Figure 633: Definition of a Quality Guideline

When the question "The instructor is always well prepared" reaches a mean of 4.8 in a survey, a green traffic light symbol indicates that the target value (>3.35) has been reached.

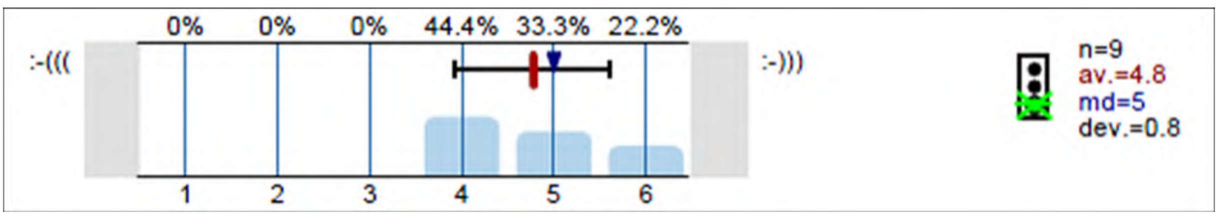


Figure 634: Traffic Light in a PDF Report

For more detailed information on the calculation of the quality guidelines, see chapter C 8.2. "Percentile Ranks".

Hint:

If in the questionnaire you have defined questions where the best/worst evaluation result can be found exactly in the middle (= “level questions”), you can choose them twice when defining a quality guideline.

A possible level question is “Do you think the number of presentations was adequate?”. In answer to this, the interviewees can select one of seven possible options connected with the ratings “too few” – “just perfect” – “too many”. The positive judgments lie in the middle (when the interviewees choose “just perfect”, respectively the value of 4). To integrate these questions into the quality guideline in a meaningful way, first choose a question and define the first side of the scale to be negative (“left of the middle”). For evaluation results below a certain threshold (e.g. 2.5), you have to make a quality deduction. As normal, you have to define a range of tolerance here (e.g. 2.0 to 2.5).

For the other side of the scale (“right of the middle”) you have to choose the question once again. Now you can say that results bigger than the upper threshold will also cause a deduction of quality (e.g. the upper threshold may be 6 – again with a chosen range of tolerance). In this way you ensure the level questions are interpreted in a meaningful way in regard to the quality guideline.

If you integrate level questions into the quality guidelines, the total quality percentage of all scaled questions can exceed 100% because each of the level questions needs to be included twice.

Pleaso note: After choosing a question once it will be marked by an asterisk (*) in the list. Thus you will be informed that it is already in use in the quality guideline.

Frequency-Based Quality Guidelines

As an alternative to the averaged-based quality guidelines discussed above you can set so-called frequency-based quality guidelines. In this case, the decisive criterion is not a mean value which is equally influenced by all respondents, but a specified frequency of responses within a particular range of response values.

Setting Frequency-Based Quality Guidelines

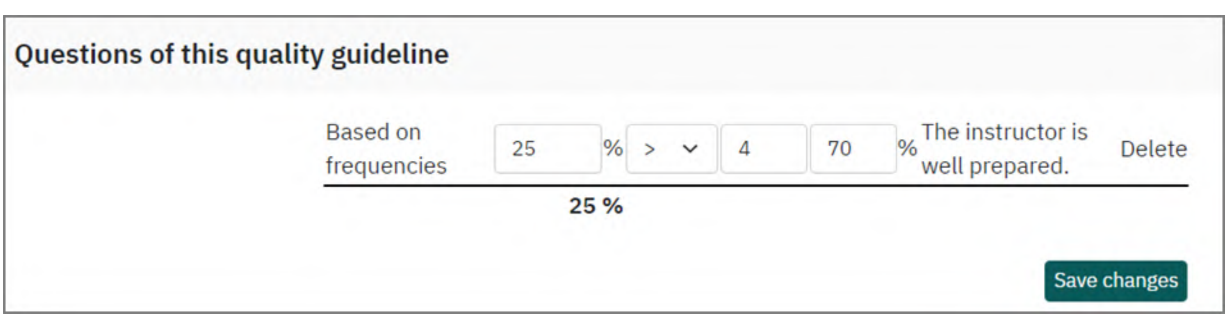


Figure 635: Frequency-Based Quality Guideline

In this example, we are dealing with a scaled question with 5 answers (in this case, smaller values are better). The goal of this guideline is to apply a deduction of 25% if 10% or more participants select the negative options 4 and 5.

This means that more than 90% of the participants must select options 1, 2, or 3 in order to meet the requirements above. Therefore, the condition is set that more than 90% of the survey participants must select an option equal to or lower than 3 in order to meet quality guidelines.

Advantages and Drawbacks of Frequency-Based Quality Guidelines

The advantage of frequency-based quality guidelines is that a certain critical mass (in this case 20%) can have the effect that a quality guideline is not met, independent of the opinion of the remaining respondents.

As a drawback it has to be noted that, contrary to average-based quality guidelines, there is no tolerance region and therefore when the targeted value is not reached, the full deduction comes to effect immediately.

Example calculation, when higher values are better:

In the following example for the scaled question "The instructor handles the technical equipment (video, projector etc.) without any problems." with 6 response options it was defined that at least 38% of respondents must have chosen response options 5 or 6. At the same time it was set that high values are better.

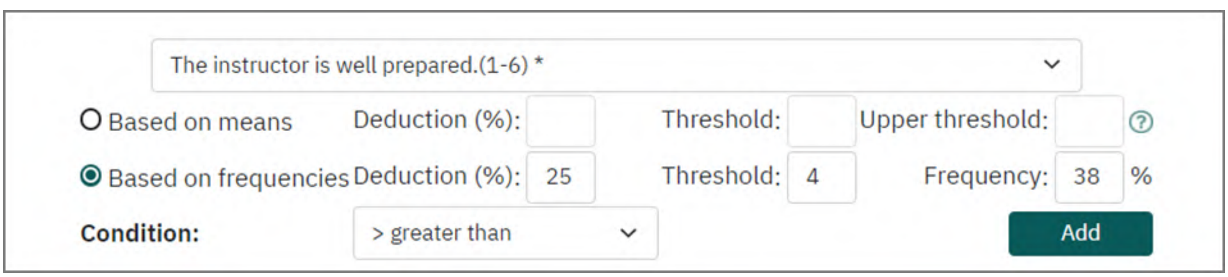


Figure 636: Define Frequency-Based Quality Guideline

In the following image, a total of 66.7% (4x 16.7%) of participants have checked a value of equal to or smaller than 5 for the question "The food is always fresh." Thus, a green traffic light symbol appears in the PDF report, as the desired value has been reached.

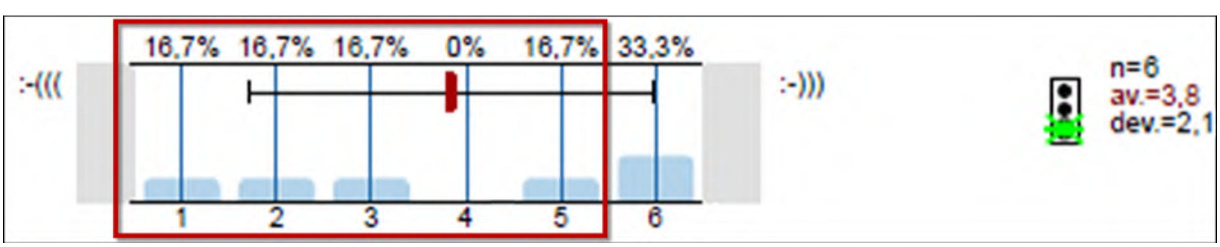


Figure 637: Frequency-Based Quality Guideline - Traffic Light

Note:
Only whole numbers can be entered as percent figures. Decimal numbers are not supported. For example, if you fill in the percentage value of 38.5% evasys automatically rounds this to 39%. A value of 38.2% would be automatically rounded down to 38%.

6.2.3. Converting Indicators into Quality Guidelines

If you have defined indicators for your questionnaire already you can use these in order to save work when defining quality guidelines. evasys can convert question groups for which you have set indicators automatically into quality guidelines; it allocates the questions corresponding to the question group to the respective quality guideline. Like this, the structure of a questionnaire with its question groups and questions belonging to them can be directly adopted for the quality guidelines.

In order to convert guidelines, choose the option “Quality Guidelines” in the drop-down menu “Advanced Settings” and click on [Edit]. You are now offered a dialogue where you can define quality guidelines.

Now click on [Convert quality guidelines from indicators]:

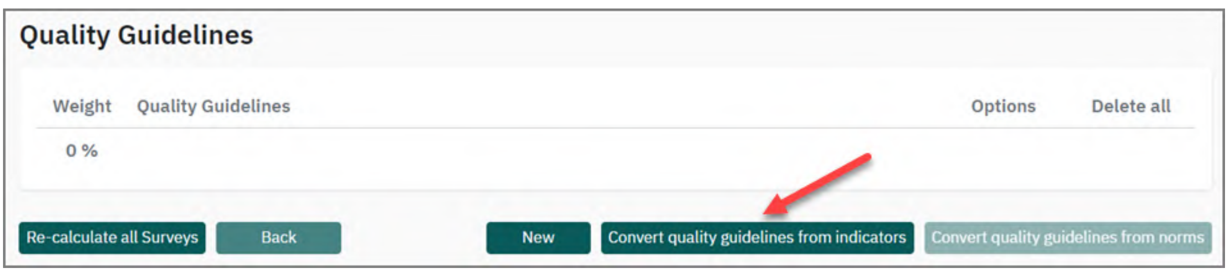


Figure 638: Button “Convert quality guidelines from indicators”

Note:
As only one set of quality guidelines can be defined for a questionnaire, the button [Convert quality guidelines from indicators] is only available if no other guidelines had been defined before. If needed, you can delete existing guidelines via the link “Delete all” (top right). Please note that the deletion of quality guidelines cannot be undone.

The button is also unavailable if there have not been defined any indicators for the questionnaire so far. In this case please check whether you have already defined indicators for the questionnaire.

How you can set up indicators in evasys is explained in chapter B 5.1.3. “Creating the Indicators for a Questionnaire”.

After clicking on the button [Convert quality guidelines from indicators], the following window appears, listing the content of the questionnaire with its question groups and questions:

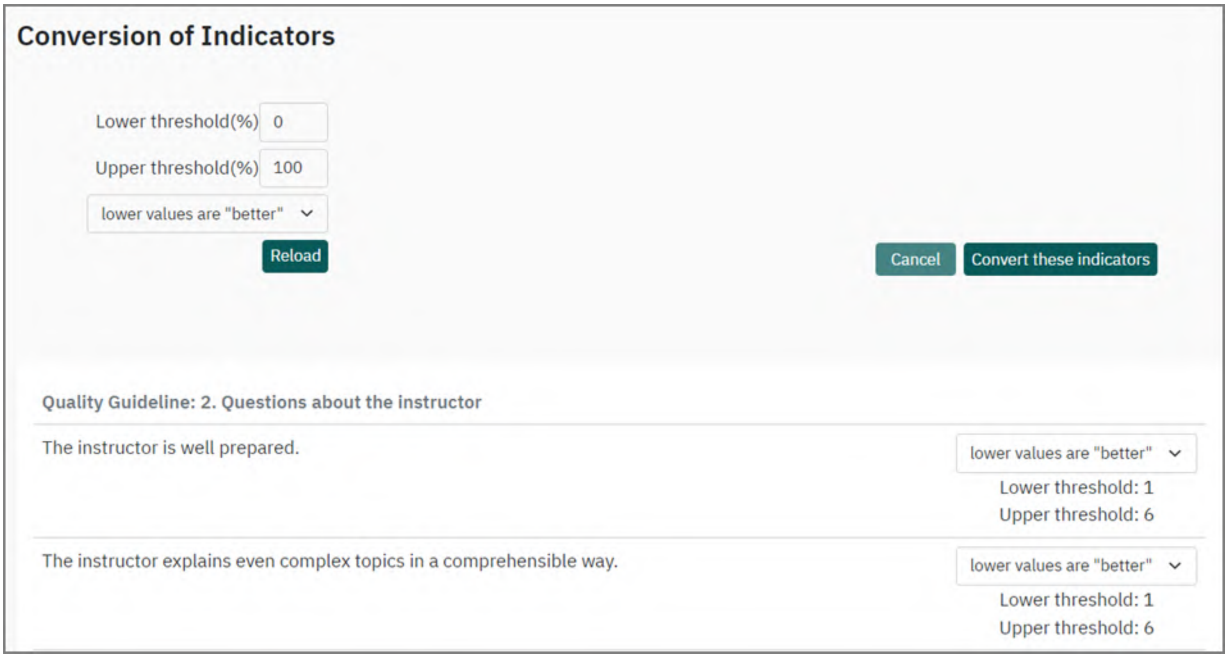


Figure 639: Converting a Quality Guideline from Indicators (Dialog for Conversion)

On the top left the relevant lower and upper threshold values for the quality guidelines are set for all scaled questions in terms of percentage values. In addition you can declare a global default setting regarding the orientation of the scales (whether higher values are better or lower values are better).

Underneath you find the question groups with all scaled questions that belong to them. On the right-hand side you find for each scaled question a drop-down menu as well as the lower and upper threshold values.

The orientation of the scales is particularly important: Here, this can be defined individually, so that you can change poles for individual questions if necessary. The threshold values for the range of tolerance depend on the length of your scale (2 to 11 options); exact target values can be defined later. In order to refresh the view after editing values click on [Reload].

The following examples illustrate some threshold values for different scales:

Type of Scale	Lower Threshold 40%	Upper Threshold 60%	Poling	Resulting Quality Guideline
4-point scale	2.2	2.8	Higher values are better	> (2.2 - 2.8)
5-point scale	2.6	3.4	Higher values are better	> (2.6 - 3.4)
6-point scale	3	4	Higher values are better	> (3 - 4)
7-point scale	3.4	4.6	Higher values are better	> (3.4 - 4.6)
4-point scale	2.2	2.8	Lower values are better	< (2.2 - 2.8)
5-point scale	2.6	3.4	Lower values are better	< (2.6 - 3.4)
6-point scale	3	4	Lower values are better	< (3 - 4)
7-point scale	3.4	4.6	Lower values are better	< (3.4 - 4.6)

Table 19: Threshold Values

Example:

Calculation of a tolerance range for: lower threshold = 40%; upper threshold = 60%.

- *e. g. 4-point scale: Distance of three whole units between 1 and 4*

Lower threshold:

- *40% (=0.4) of the three units: 3 * 0.4 = 1.2*
- *Add the value of 1.2 to the starting value of the scale (= 1, as there has to be ticked at least the value "1"): equals 2.2*

Upper threshold:

- *60% (=0.6) of the three units: 3 * 0.6 = 1.8*
- *Add the value of 1.8 to the starting value of the scale (=1): equals 2.8*

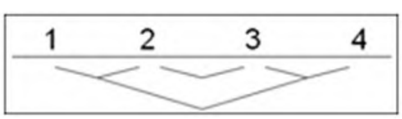


Figure 640: ***Quality Guidelines: Three whole Units, Beginning at "1"***

Type of Scale	Lower Threshold 40%	Upper Threshold 60%	Poling	Resulting Quality Guideline
4-point scale	2.2	2.8	Higher values are better	> (2.2 - 2.8)

Table 20: Threshold Values - Example of a 4-Point Scale

After you have chosen all settings, click on [Convert these indicators], in order to create the quality guidelines. Afterwards quality indices for all surveys that were conducted with this questionnaire are computed automatically. As usual, a green circle symbolizes a quality guideline that has been fully met and a red circle one that has not been met (with several stages in between). Gray circles denote that the quality guidelines could not be calculated since there are no relevant results for these surveys. This can for example be the case if:

- in the report of the survey no scale questions exist. (either no scale questions in the questionnaire were specified or the scale questions have been disabled for example by hiding the individual questions in the PDF report)
- the data were deleted from the survey, so the occurrence of the quality guidelines can not be displayed.
- no data for the determination of the quality guidelines exist, for example, because as yet no returns exist for the survey.

Since the quality guidelines of these surveys can not be calculated, the surveys are shown with "--%" in the overview.

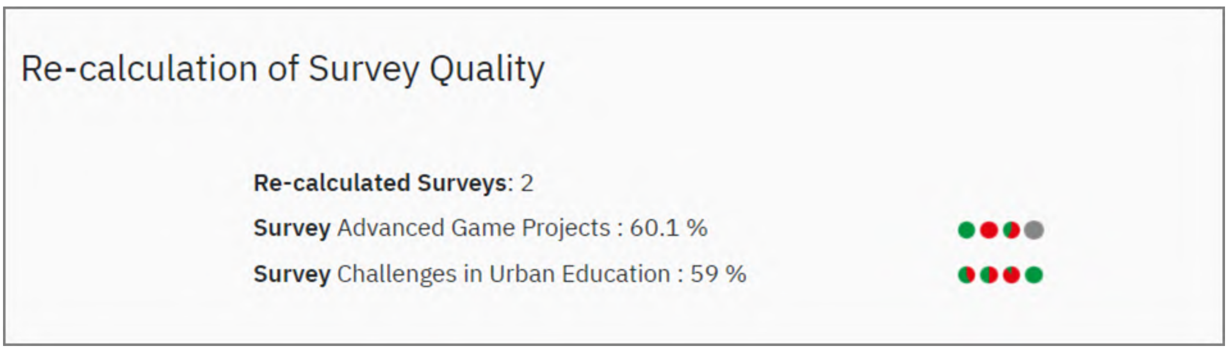
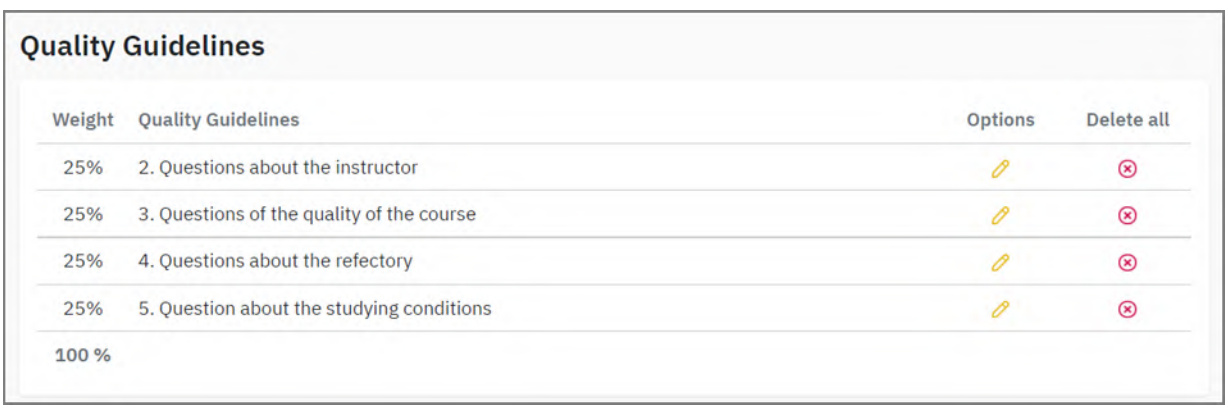


Figure 641: Quality Guidelines: Re-Calculation of Quality Indices

In the overview of the quality guidelines you can now see the question groups of the questionnaire as quality guidelines



Quality Guidelines

Weight	Quality Guidelines	Options	Delete all
25%	2. Questions about the instructor		
25%	3. Questions of the quality of the course		
25%	4. Questions about the refectory		
25%	5. Question about the studying conditions		
100 %			

Figure 642: Quality Guidelines: Overview of Quality Guidelines

You find this list in the area "Advanced Settings" in the questionnaire details; choose the option "Quality guidelines", then click on [Edit]. The dialog pictured above appears.

Each quality guideline can now be edited as usual. For example, individual questions can be weighted differently if necessary or different threshold values can be defined:

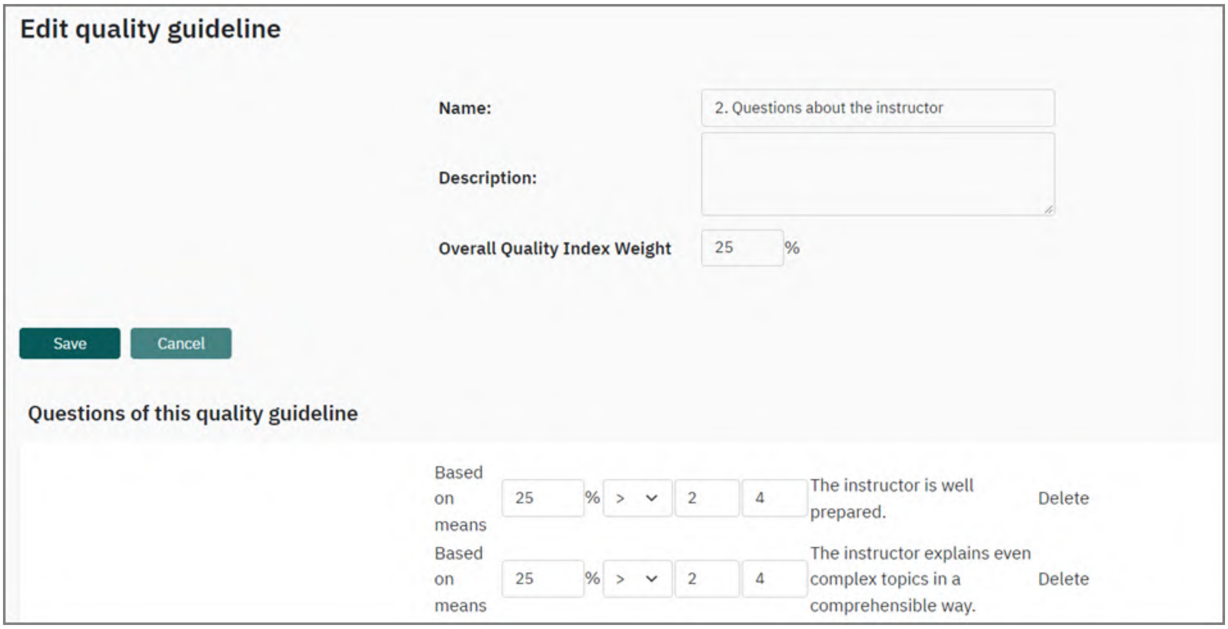


Figure 643: Edit Quality Guideline

6.2.4. Converting Norms into Quality Guidelines

When defining quality guidelines it is often difficult to decide where to set thresholds for good and poor quality. A natural approach is therefore to set these thresholds on the basis of results that you have collected with this questionnaire in past surveys. The function “Convert quality guidelines from norms” has been created to make this process simpler.

Statistical Approach

The direct basis of the quality guidelines are the norm values (i.e. mean and standard deviation of the norm base) of the individual questions. The strength of this approach is that the norm values are based on a very large data basis and the poling of the questions is already set.

The idea of the conversion is to tie the lower and upper thresholds of the quality guideline to the means and standard deviations of the norm base. Whether the threshold value corresponds exactly to the mean of the norm base or is slightly better or worse can be defined by the user by choosing a “multiple” of the standard deviation of the norm base (S).

This multiple is called granularity. The granularity can be between +3 and -3, so that you can define whether the threshold of the quality guideline is to be below or above the mean of the norm base. The granularity is chosen once for the lower and once for the upper threshold for all questions together.

The calculation of the threshold values for the quality guidelines is done automatically after the conversion.

Conversion

In order to access the conversion view choose “Quality guidelines” in the questionnaire details in the drop-down menu under “Advanced Settings”, then click on [Edit]. In the window that opens, click on the button [Convert quality guidelines from norms].

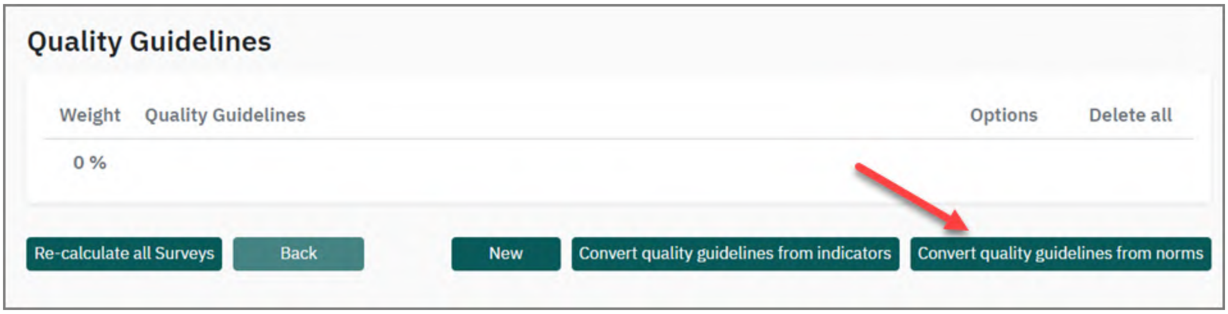


Figure 644: Button “Convert quality guidelines from norms”

Note:
As only one set of quality guidelines can be defined for a questionnaire, the button [Convert quality guidelines from norms] is only available if no other guidelines have been defined. If needed, you can delete existing guidelines via the link “Delete all” (top right). Please note that the deletion of quality guidelines cannot be undone.

The button is also unavailable if there have not been any norms defined for the questionnaire so far. In this case please check whether you have already defined norms for the questionnaire.

Details on how to create norm values can be found in chapter B “Definition of Norm Values for Questionnaires”.

After you have clicked on the button [Convert quality guidelines from norms] a new window opens showing your questionnaire with all question groups and the scaled questions that were assigned to them, as well as the mean and standard deviation of the norm base. The conversion of the dimensions (= question groups) of the norm base into quality guidelines is conducted as the conversion view is accessed.

Initially, all questions within a question group are weighted equally within the quality guideline.

Select a norm set as basis under “Base norm” in the header area. This norm set needs to be already there for the norms of this questionnaire.

The guidelines are listed with the respective questions belonging to them underneath. On the right, the norm base mean (= avg.), the norm base standard deviation (= dev.) as well as the lower and upper threshold are shown for each question. Initially, the default settings of the threshold values correspond to the norm base mean (=avg.).

Now the factor for the positive and negative threshold can be selected in the drop-down list in the header area.

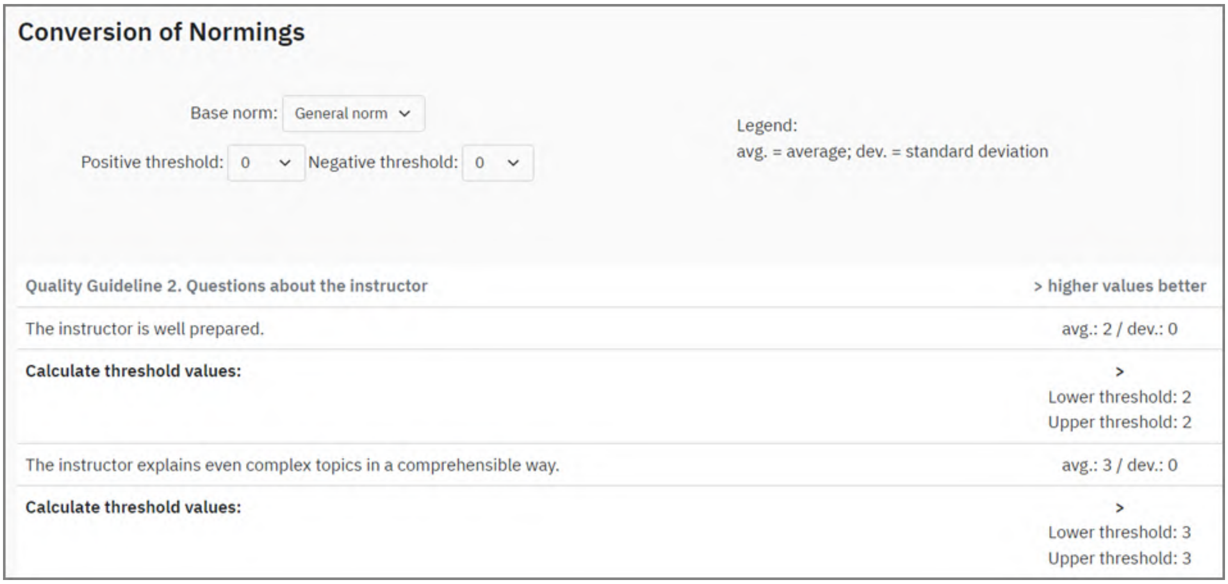


Figure 645: Quality Guidelines: Setting of Threshold Values

Threshold values can be changed with the drop-down list in the header area by setting the granularity. It should be noted that the granularity of the negative threshold needs to be equal to or larger than that of the positive threshold.

Pressing the button [Convert this norm] generates the quality guidelines and the quality indices of the relevant surveys are recalculated automatically.

Of course, once the quality guidelines have been generated automatically, they can be further edited and adapted.

For more detailed information on the calculation of the quality guidelines, see chapter C 9.4. "Quality Guidelines Converted from Norms".

6.2.5. Display quality guidelines in the PDF report

If desired, the results of the quality guidelines are displayed directly in the PDF report. This allows both a traffic light view to be displayed on the individual questions as well as an overview of the quality guidelines at the beginning of the report.

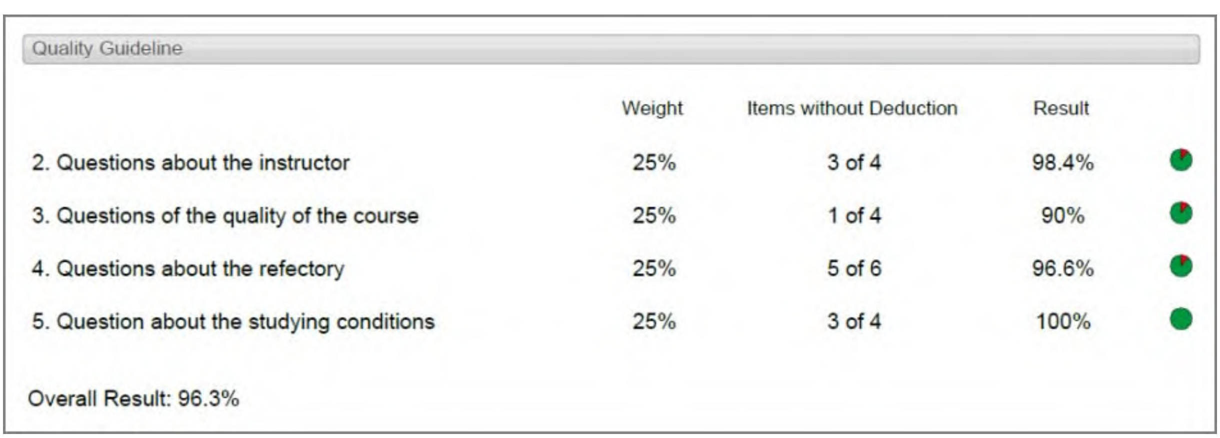


Figure 646: Overview Quality Guidelines

6.2.6. Giving access to QM views

To allow a user access to the QM views, you must have an active user account, in which the QM views are enabled. Open the profile of the user by clicking on the pencil icon. If the department leader/dean already exists as a user himself, the (Subunit-) Administrator will grant access to the QM views.

Figure 647: QM Views: Editing user data

To acquire access to QM views, the user must be an active one. Activation can be effected by clicking on the green user symbol next to the user. A new symbol without a lock appears, indicating that access has been granted. The user type “Dean” is the exception to the rule, because s/he also has access to the QM views as a passive user. Open the profile data of the user by clicking the edit symbol in the column “Actions”.

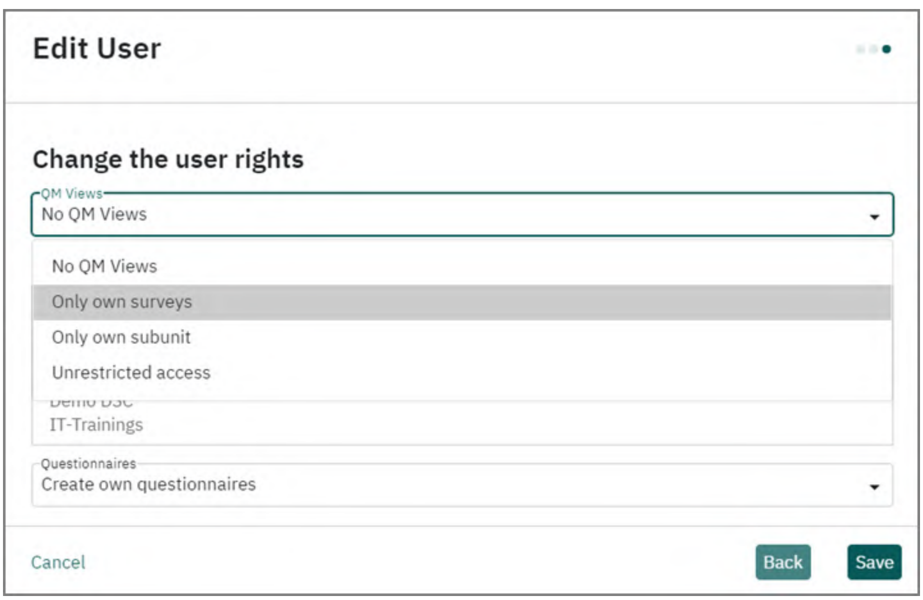


Figure 648: QM Views: Authorizing Access Rights

No QM Views

The user has no access to QM views.

Only Own Surveys

The user has only access to his own surveys. These are surveys that have been registered by the administrator to the user’s own user profile.

Only Own Subunit

This option gives the user access rights to all surveys within his own subunit.

It is possible to access multiple subunits by selecting from the “additional subunits” list. This can be done after the access level “only own subunit” has been selected.

Unrestricted Access

This option grants authorization to access all existing surveys in the system.

6.2.6. Use of QM Views

Displaying Course Lists

Individuals with access rights are informed through login details (user name, password, web address). To increase security you can restrict the permissible IP address domain. Consult the relevant section in the “Initial Operations”.

After logging in with the user name and password, the user arrives at his or her activated user account.

This user account is equivalent to an activated instructor account, that is it can also be used to implement “private” surveys.

With a click on the menu item “QM view” the quality overview is opened.

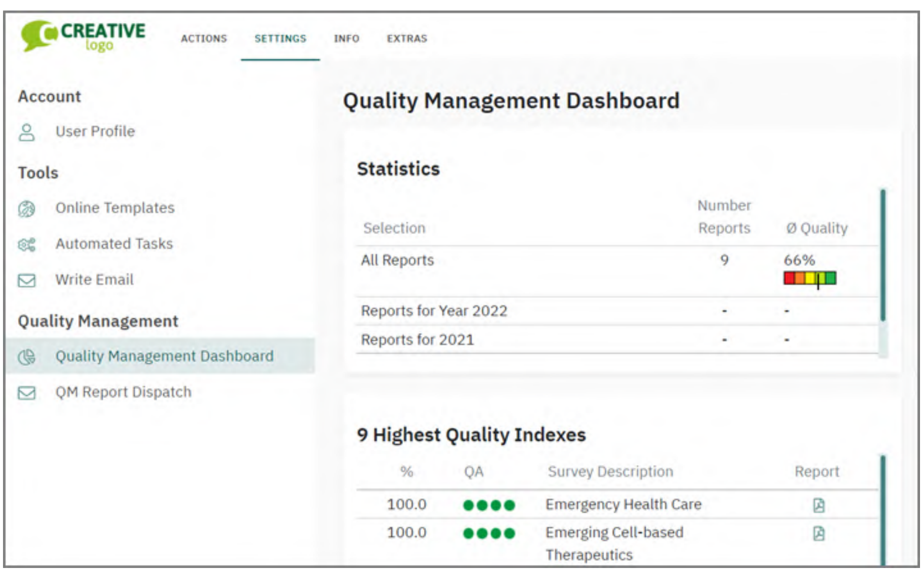


Figure 649: QM Views: Open View

This opens the start page of the QM views, which - similar to a dashboard - offers an overview of the results of the quality management based on the quality guidelines.

The area “Statistics” provides an overview of the total number of reports and the reports of the current and last period, together with the reports that have been added since the last login of the user and shows the average quality index attained by each group. By clicking on the group's name a pie chart appears in the adjacent 'Diagram' area showing as a graphic the distribution of reports according to the quality index that has been reached.

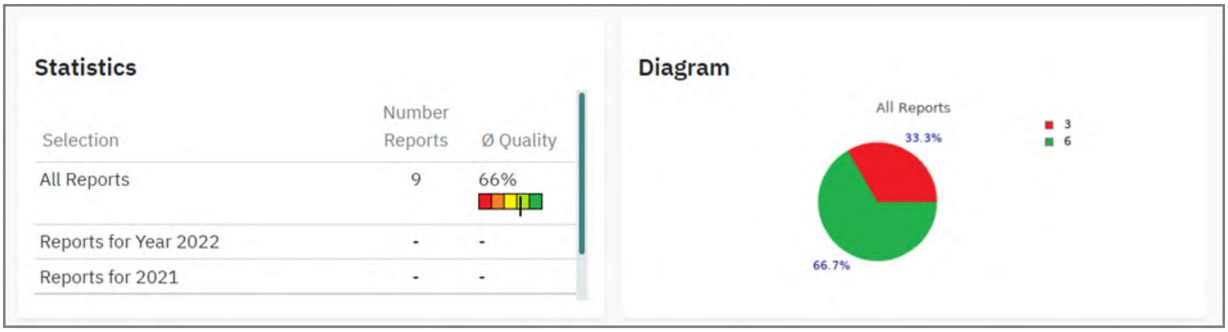


Figure 650: QM Views: Start Page - Area “Statistics” and “Diagram”

In the middle of the page, ten surveys with the highest and lowest quality indexes are presented in a table. The corresponding PDF reports to these surveys can be retrieved by clicking on the PDF icon in the “Report” column.

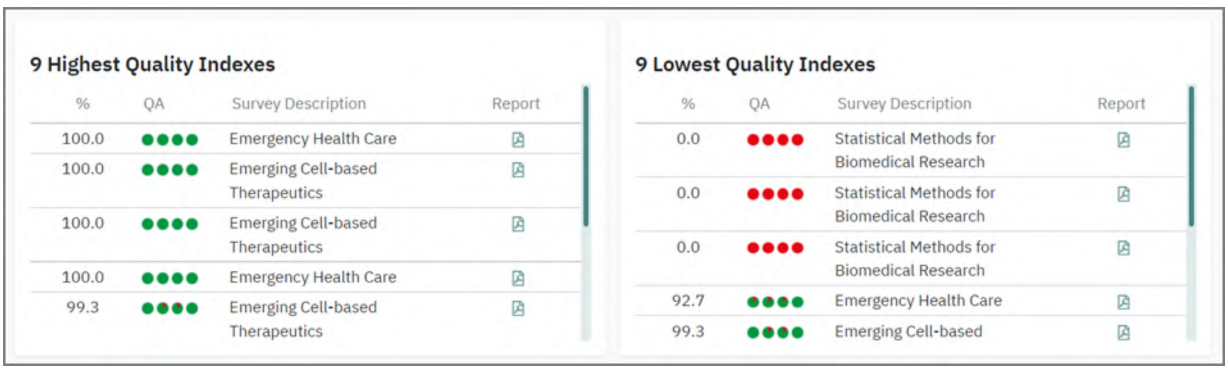


Figure 651: QM Views: Start Page - Highest and Lowest Quality Indexes

At the bottom of the window, the users' previous searches in the QM views are saved and displayed. By clicking on the name of the search the saved view is directly accessed. A click on the adjacent button [Continue to table view] leads to a complete overview of all the surveys that have been defined for the quality guidelines.

Figure 652: QM Views: Start Page - Saved Searches and Access to Table

The table opens in a new browser tab or browser window. All evaluated courses with quality guidelines are shown in the list.

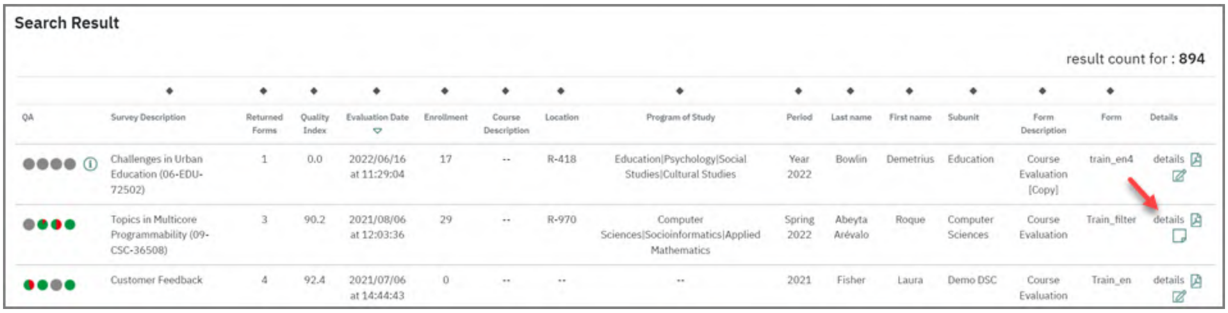


Figure 653: QM Views: Overview

In the example the results are for instance shown for the survey of the course “Leadership Development” with a quality calculated at 68.0%.

The green-red circles each represent a quality guideline, in this example teaching structure/practical application/interest/interaction. The more red area, the more questions in this quality guideline are below the targeted value. In order to receive a more precise view, click on [Details].

You will then see a detailed list of all the quality guidelines of the questionnaire as well as those questions which did not reach the target value.

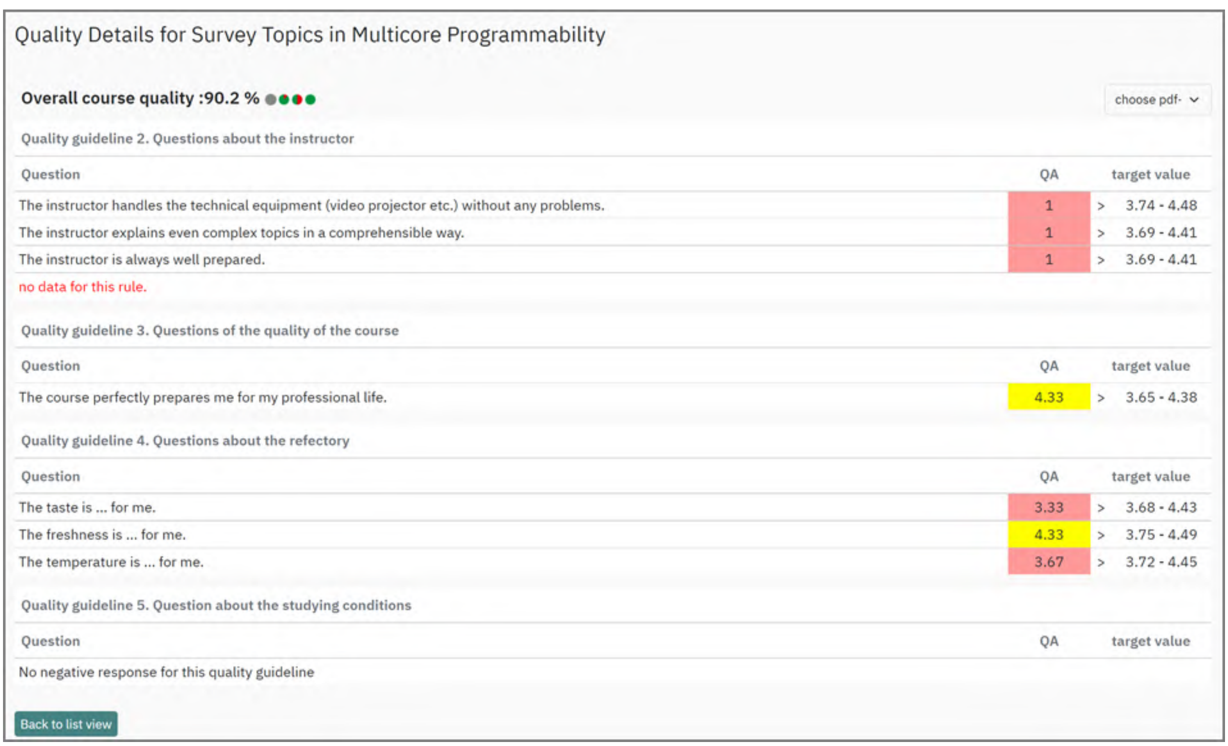


Figure 654: QM Views: Quality Details

If a value is marked in red, the quality guideline has not been met at all; if the color is yellow, the value is within the range of tolerance. Other colors are not applied.

In order to open the complete report of the survey, click on [To the List] and in the line of the survey you are interested in on  to open the PDF report.

If an information icon appears in the first column beside the green and red circles, then this means that data is available for this survey that has not yet been incorporated into the quality guidelines calculation. This can be the case, if, for example, the online survey data has been entered, but the PDF report has not yet been opened. Click the icon to calculate the quality guidelines for this survey. The quality guidelines are now newly calculated for this survey.

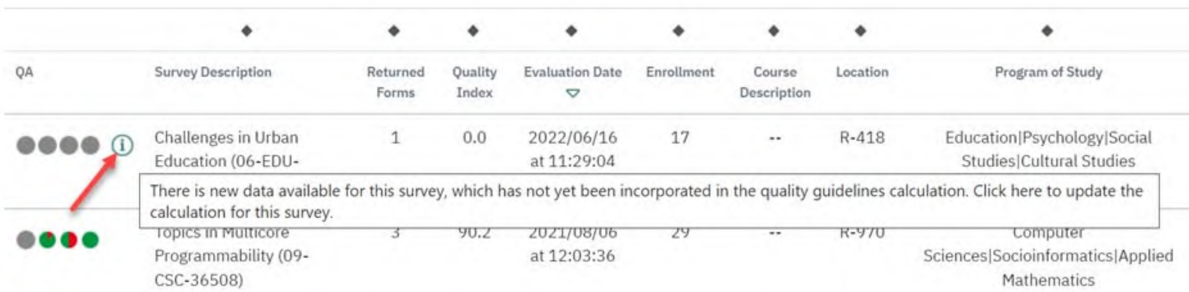


Figure 655: QM Views: New Calculation for Single Surveys

6.2.7. Definition of Special Search and Table Configurations

In order to build a table according to your own specifications you can define searches yourself and save them. One of these self-defined searches can then be saved as the new default search. When you next login at evasys, this self-defined default search will automatically be used.

To define a search use the menu “Options” to arrive at all the necessary functions. These are:

Figure 656: QM Views: Special Search Configuration

- Search:
  This is the search mode in which you will use the table view.
- Field selection:
  Here you can select those database fields you would like to use in your search.
- Sequence fields:
  This allows you to determine or change the sequence of columns selected in “field selection”.

- Save search:

  This function allows you to save the current search settings under a name you enter or to replace an existing search.
- Delete search:

  This function lets you remove self-defined search settings.

Defining the Display and Search Fields

Using “Field selection” in the option field will display the database fields defined for the current search. In this example the fields are from the pre-set default search.

The fields appear twice. In the upper area the fields needed for the table view are marked. In the lower area those fields appear which are to be searched using the “Search” field. The selection of the search fields should include only those fields to be displayed.

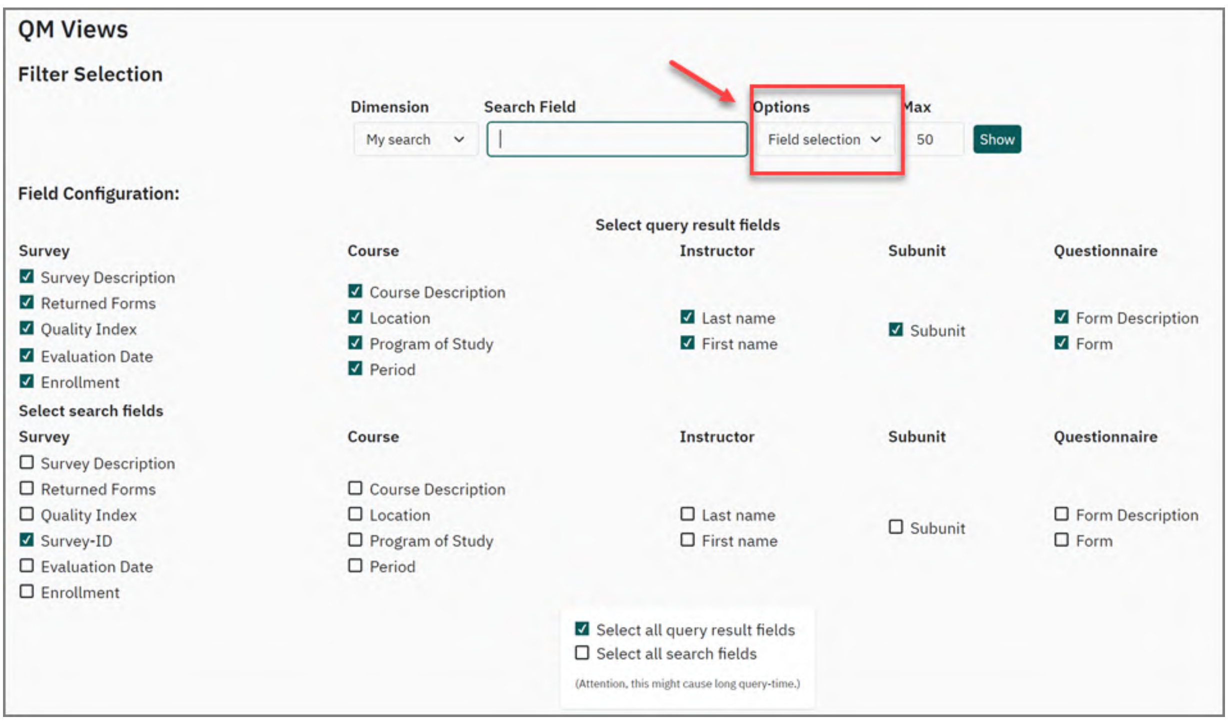


Figure 657: QM Views: Field Selection

Please note that it may not be possible to completely display more than 10 fields in the screen horizontally, i.e. you will then have to scroll. Also a large number of search fields will mean greater use of the database and a noticeably longer processing time.

By clicking on “Select all fields of the search display” or “Select all search fields” at the bottom of this view you can save time if you want to activate all of the above fields.

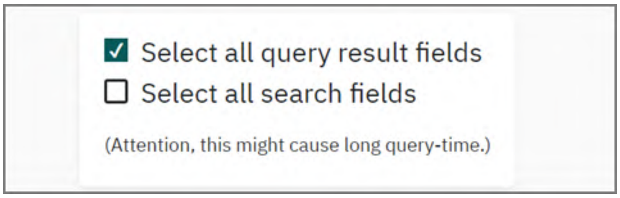


Figure 658: QM Views: Select all Query Result Fields

Defining the Sequence of the Fields

After you have selected the fields you can change their sequence by using the option “Sequence fields”. Highlight, as shown in the figure, a field name and then click on [<<] “up” or on [>>] “down”.

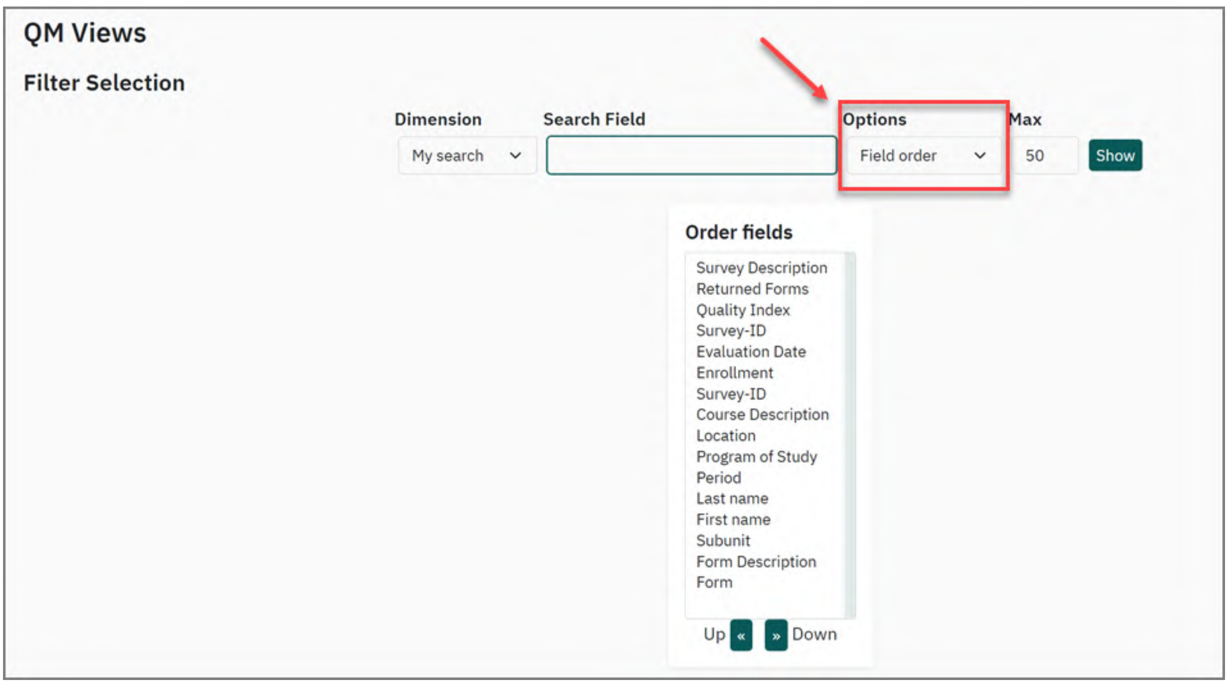


Figure 659: QM Views: Order Fields

Saving Your Search Settings

Now you can save your current search setting. Activate the option “Save search”. Enter a name. By highlighting “Set as default”, the current search setting will be displayed every time you login. Finally click on [Save Search].

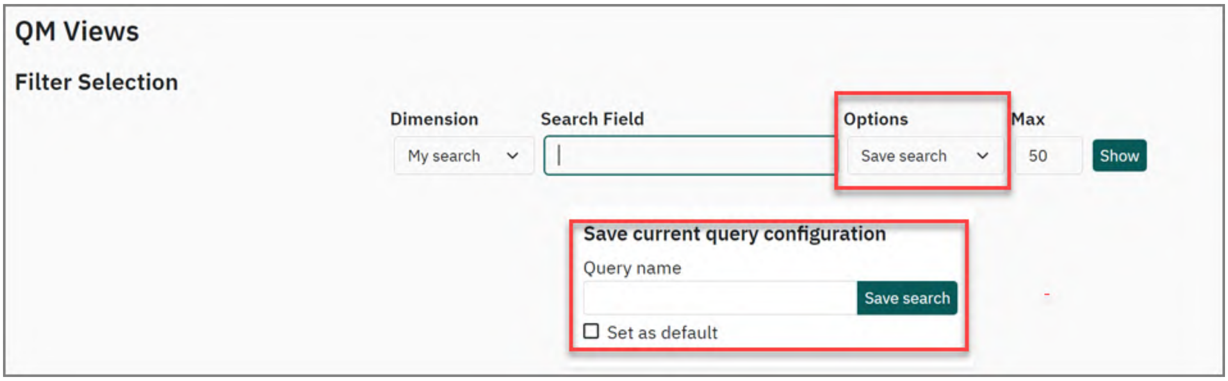


Figure 660: QM Views: Save your Search Settings

Deleting Your Search Settings

Using the option “Delete search” brings you to a selection list in which you can select the search settings to be deleted. Then click on [Delete].

You can only delete settings you have defined yourself.

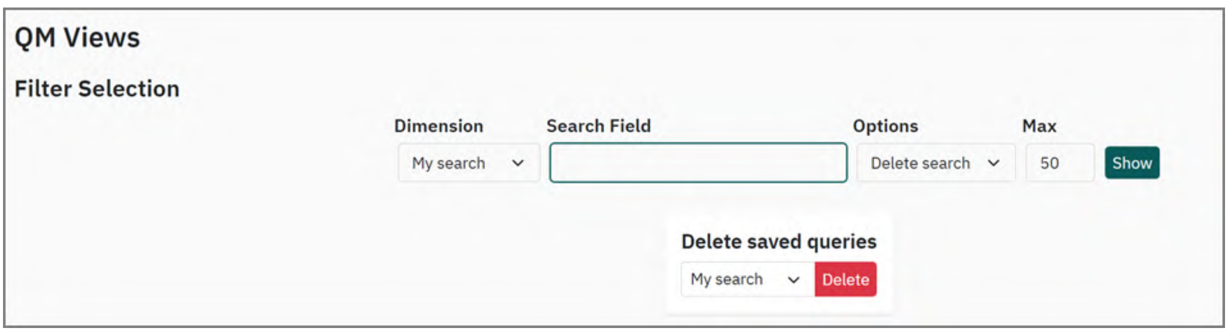


Figure 661: QM Views: Delete your Search Settings

6.2.8. Report Dispatch for Quality Management

On the basis of the quality guidelines a report can be sent to selected recipients in regular cycles, which present the results of the evasys Quality Management in a matrix. Dispatch cycle, period and recipient can be flexibly defined.

To set up the report dispatch, open the menu “Subunits/QM Report Dispatch”. This opens an input screen where you can store the framework data of the first report dispatch.

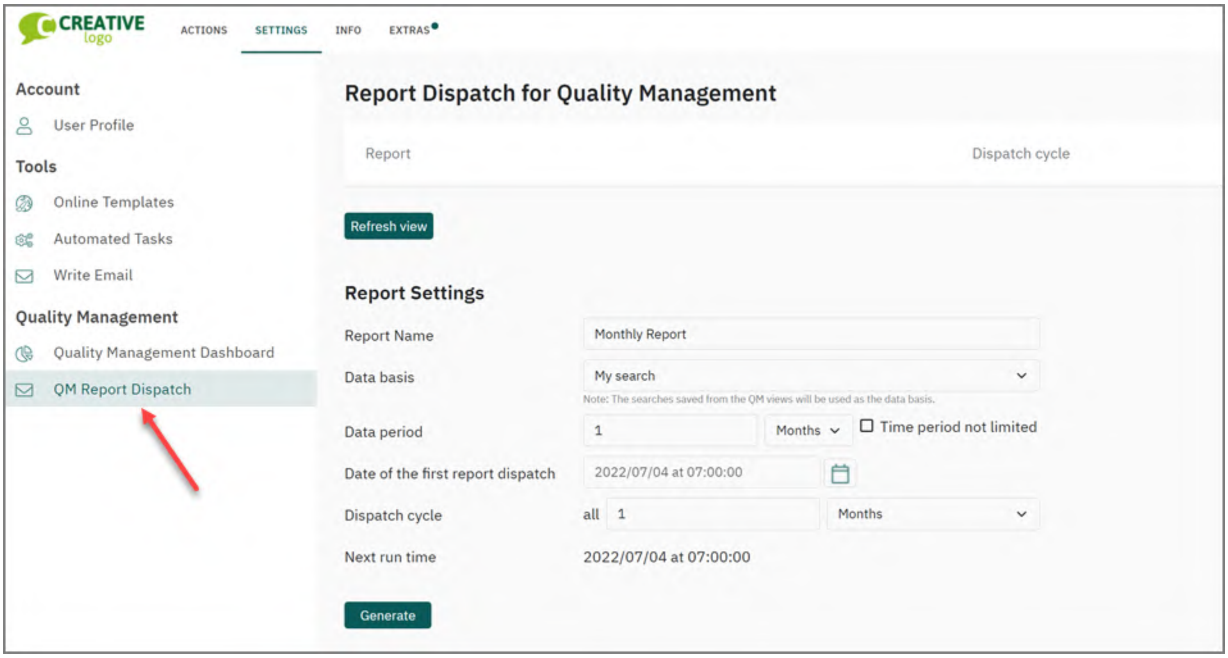


Figure 662: QM Report Dispatch: Set Up

First enter the name of the report and then select the data on which the report should be based. Here all defined searches saved in the QM Views are available to you, so that reports can be generated while filtering a limited number of surveys.

Optionally, the data period can be restricted, i.e. a period can be defined from which the presented data should originate. In this way, for example, for weekly reports only the relevant events of the past week are presented in the report. If a period is not specified, all data from the database are used.

Furthermore, the date for the first report dispatch and the dispatch cycle are defined as well as the report recipient being defined from a list of users in the system with the account type professor or dean. By clicking on the [New] button, the report settings are saved and the report will be presented in the report list.

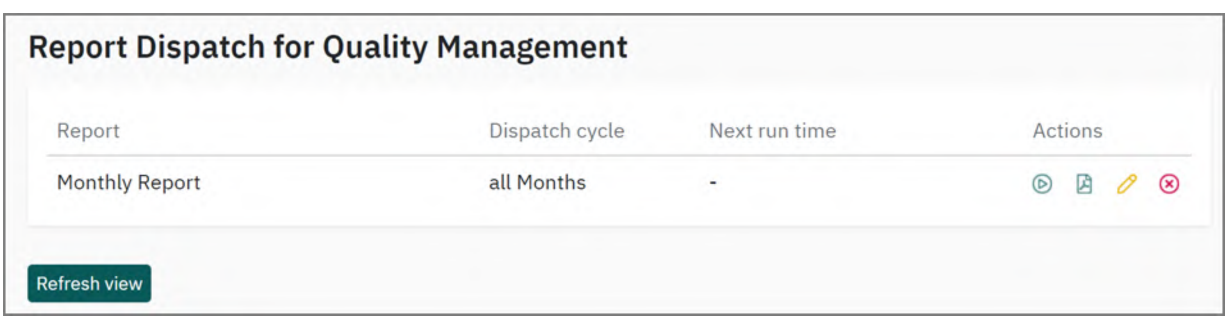


Figure 663: QM Report Dispatch: Report List

In the Actions section the report can, if necessary, be disabled via the clock symbol, by using the pencil symbol it can be edited or deleted by clicking on the cross. Via the PDF symbol, a preview of the report is available on the basis of current database.

QA				Survey Description	Returned Forms	Quality Index	Evaluation Date	Folder / Period	Enrollment	Location	Program of Study	Last name, First name	Subunit	Form
a	b	c	d											
●	●	●	●	Media Selection and Evaluation	96	100	2020/11/27 at 11:10:42	Fall 2020	137	R-062	Education|Psychology|Social Studies|Cultural Studies	Swoope, Rachel	Computer Sciences	Train_en2
●	●	●	●	Education Performance Problems: Role of Learning	93	100	2020/11/27 at 11:10:41	Fall 2020	9	R-603	Education|Psychology|Social Studies|Cultural Studies	Yates, Jimmie	Education	Train_en2

Figure 664: QM Report: Report Preview

Any number of reports can be defined for other recipients if required. The reports are delivered to the recipients at the times specified via email. The email text can be edited via the text template to “E-MAIL Quality Management Report”. To edit text documents, see chapter D 2.1. “Text Templates”.

6.2.9. Automatic Notification for deviant Quality Index

Aided by the automatic notification feature, one or more persons can be notified when the evaluation result of a survey is above or below a defined quality threshold. In this way, on completion of the survey, any necessary measures can be promptly initiated.

The notification settings are made by the administrator or subunit administrator using the menu “Subunits/QM Notification”. Should the subunit administrator be unable to make any settings, s/he can be deprived of this right in the configuration (under “System Settings/evasys Settings/Functions/Subunit Administrator: Notification on Defined Evaluation Results”).

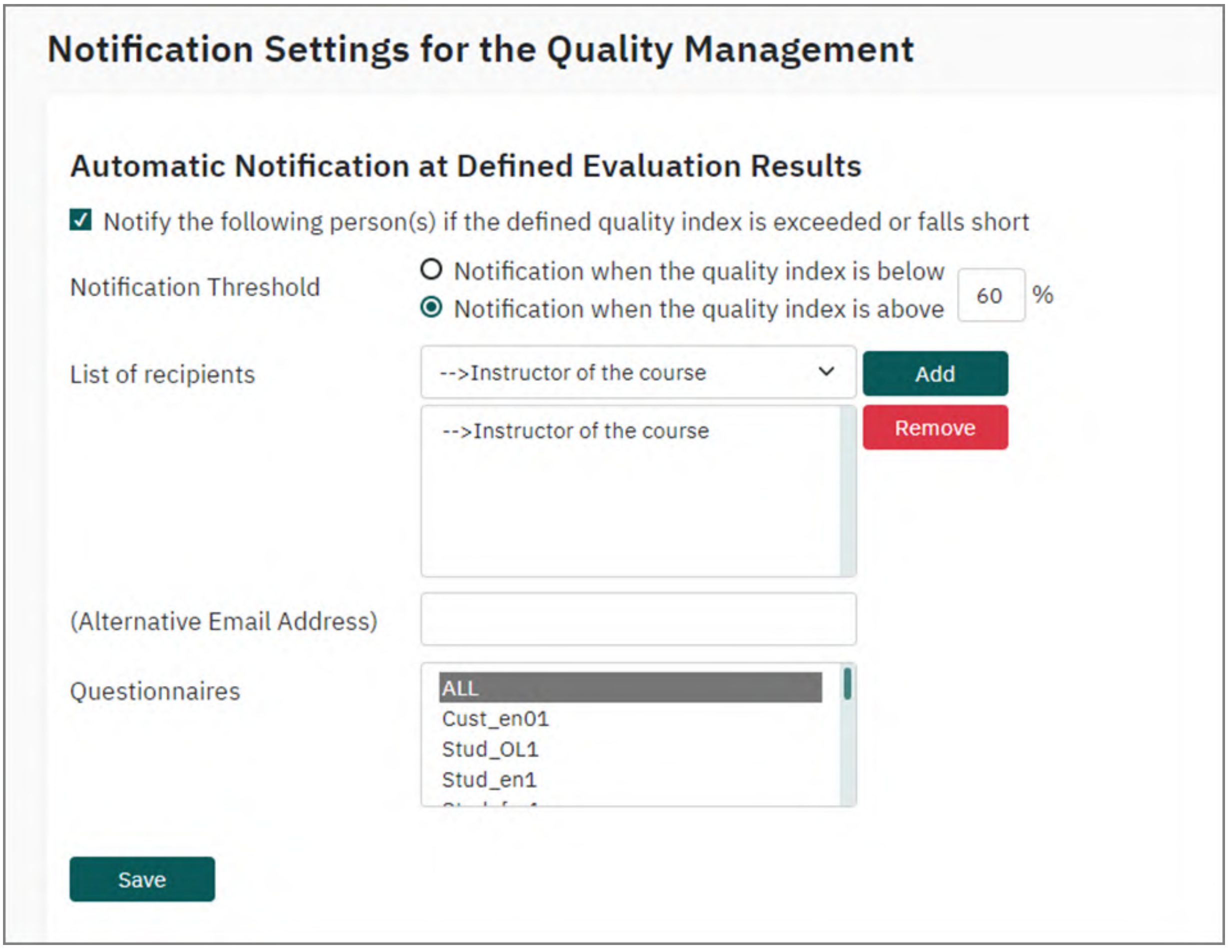


Figure 665: QM Notification: Notification Settings

Activate the option “Notify the following person(s) if the defined quality index is exceeded or falls short” to activate the notification function. Then, in the “Notification Threshold” set the percentage of the quality index by which when above or below, a notification will be sent. In the area “List of Recipients” you can define which person or persons are to receive the notification. In addition to the instructor of the course and the dean of the subunit, the administrator and all users in the system of type instructor, dean or subunit administrator can be selected. Additionally or alternatively, an external email address can be stored. At the bottom of the window it can be determined whether the notification should be take place for all questionnaires with quality guidelines, or only for specific ones, which can be selected by CTRL + click. The settings are saved by clicking on the [Save] button.

As soon as the relevant questionnaires of paper surveys are scanned in or online surveys are closed and the results exceed or fall below the defined threshold, a notification is sent.

The text of the notification email should first be adapted by the administrator or the subunit administrator in the text templates (either globally or for the relevant questionnaire). The relevant text template “E-MAIL: Notification at defined evaluation results” already contains default placeholders which are dynamically generated by the attained quality index for the course as well as the defined threshold. Furthermore, with the help of a placeholder a link is inserted leading to the QM views of the relevant survey:

Dear Sir or Madam,

The evaluation of the course “[SURVEY]” resulted in a total quality grade of [SURVEY_QUALITYINDEX]%. As such, the defined quality threshold of [DEFINED_SLA]% was [EXCEEDED_OR_FALLEN_BELOW].

For detailed information please follow the link: [LINK_TO_QM_DETAILS]

Your evasys Administrator

Note: This E-Mail was generated automatically.

After clicking on the link the email recipient must login with his evasys access data. S/he can only have an insight if his user account allows him the appropriate access. To edit the text templates see chapter D 2.1. “Text Templates”.

7. Module Evaluation

The functionality “Module Evaluation” was developed to allow multiple separate surveys to be combined into a single questionnaire.

evasys generates a module questionnaire which contains multiple areas belonging to the individual courses in a module. After processing the module survey evasys generates a report for the module but also separate results for each module element. This allows separate reporting based on each part of the module survey.

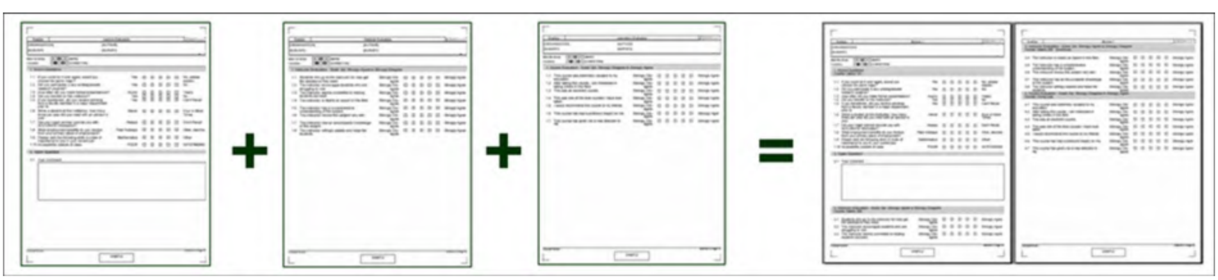


Figure 666: Build up a Module Questionnaire

- Setting up a survey with Module Evaluation
- Activating module surveys
- Creating Module Questionnaires and Linking Them to Course Types
- Characteristics of the Aggregated Questionnaire
- Creating a Module Account
- Creating module courses

7.1. Setting up a survey with Module Evaluation

By default, the possibility to conduct module surveys is already activated in the system; if the standard settings have been changed, activate the general possibility to conduct module surveys in the evasys Settings (Menu “System Settings/evasys Settings/Survey/Module Evaluation/Module Evaluation”)

To set up a survey with module evaluation, several steps have to be taken:

- Create questionnaires you want to use to evaluate your single module courses
- Link the module questionnaires to course types (Menu “System Settings/Course Types”); in case of module surveys, the course type has the function to assign questionnaires to courses
- Create a module in the subunit
- Undertake the settings at the basic course of the module (e.g. import participants, save program of studies, etc.)
- Create the individual module parts at courses for the module
  - Select the questionnaire with which you would like to question this course
  - Define a report recipient (s/he corresponds to the course instructor/trainer and will receive the report)
- Generate survey (switch to module evaluation)
- After conducting the survey open the general PDF-Report to initiate the creation of the PDF-Reports for the single module courses.

In the following chapters, the conduction of the single steps will be discussed in detail.

7.2. Activating module surveys

The module evaluation is activated by default. As administrator you can change the setting in the menu “System Settings/evasys Settings/Survey” in the tab “Module Evaluation”. Activate or deactivate the “Module Evaluation” and save the changes by clicking [Save] at the bottom of the page.

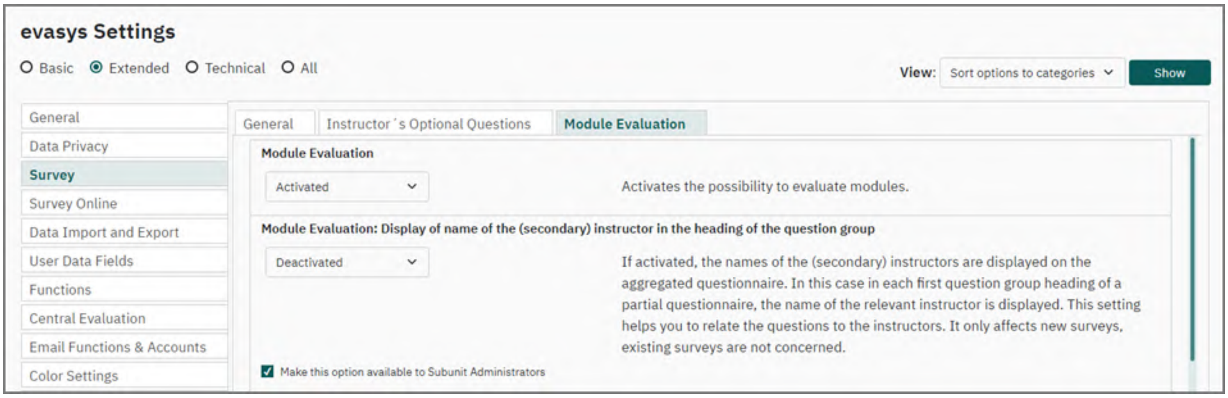


Figure 667: Activate Module Evaluation

7.3. Creating Module Questionnaires and Linking Them to Course Types

Module questionnaires consist of multiple components which are used to display general questions about the module itself or special questions related to single courses or course elements in the module.

For each of the building bricks of a module survey individual questionnaires need to be created using the VividForms Editor, e.g. one for general questions, one for lectures, one for seminars etc. (for creating a questionnaire see “Creating Questionnaires with VividForms Editor”).

Remember to give the forms short relevant names so that they can later be separated.

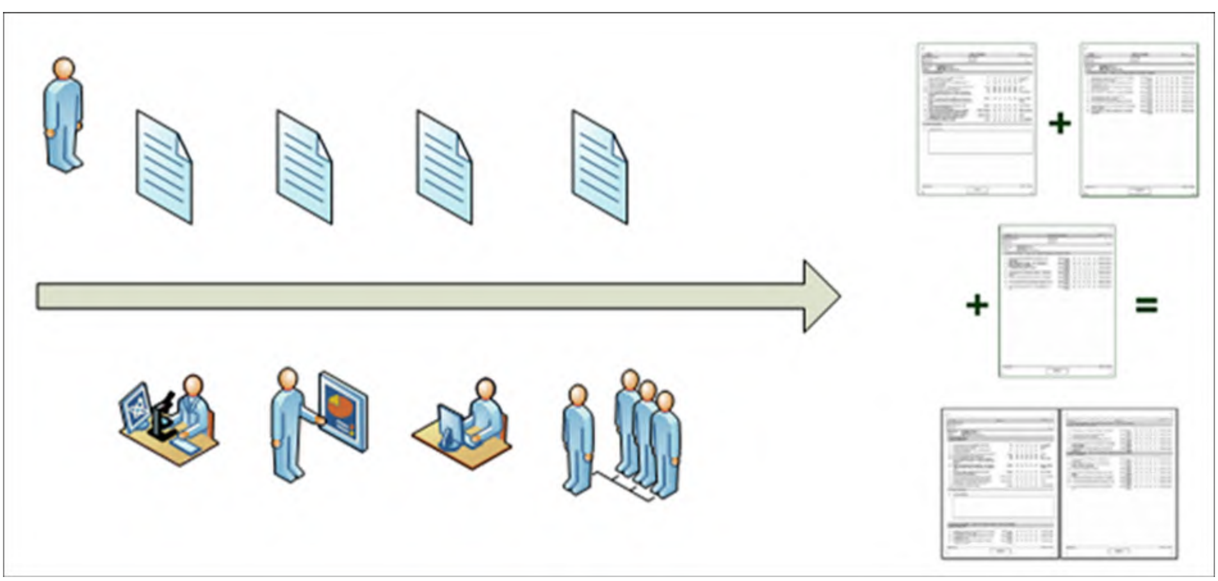


Figure 668: Create Module Questionnaires

Now the single questionnaires have to be linked to course types. In the context of module surveys, the course type has the function to define, which of your questionnaires evasys will use for the evaluation of a course. Therefore questionnaire and course types are linked for module surveys.

Thus, in the context of module surveys the category “course type” does not have to equal the ‘classic’ course type in common evaluation. In some cases it can be advisable, to create own course types for the evaluation of your modules. If, for example, you want to use a ‘general questionnaire’ for the evaluation of the module in total and a ‘trainer questionnaire’ to evaluate the single courses of your module, you can create corresponding course types such as ‘module general’ and ‘module trainer’.

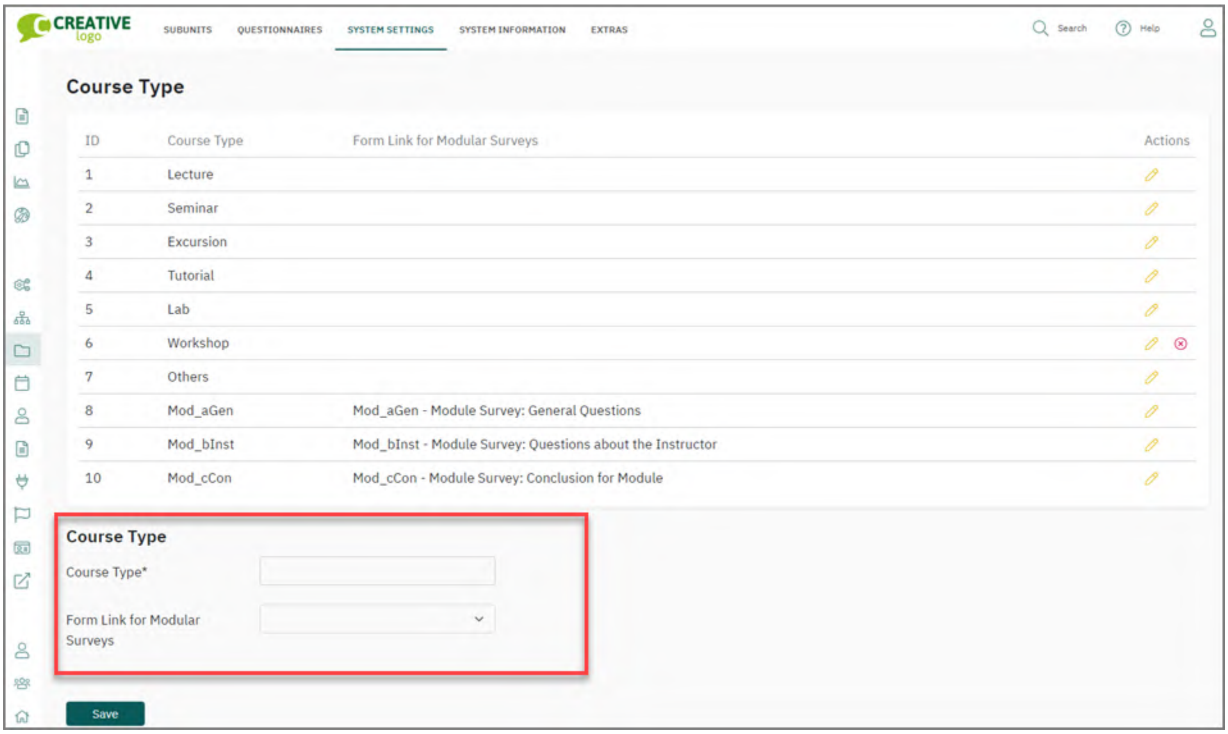


Figure 669: Form link for modular surveys

To link questionnaires to course types, open the dialog “System Settings/Course Types”. To create new course types, for example a course type “Module General” for the evaluation of the module in total, enter a new name in the area “Course Type” and select the corresponding questionnaire from the drop-down list underneath (“Form Link for Modular Surveys”). Click on [New] to add the new course type to the list.

To link a questionnaire to an existing course type, click on the pencil icon. You will find the selected course type in the area “Course Type” at the bottom of the list. Select the corresponding module questionnaire for the selected course type and click on [Save] to apply the selection.

7.4. Characteristics of the Aggregated Questionnaire

When generating a survey, the questionnaires for the different module parts are automatically merged to a complete module questionnaire. The sequence of the questionnaire parts can be defined while setting up the module courses (see below chapter B 7.6. “Creating module courses”).

The first part form determines:

- Font type
- Default font size
- Line height; Exception: If the font size of a question group of one of the questionnaire parts is bigger than the line height of the first questionnaire, the line height will be accordingly adapted for the whole questionnaire.
- Layout (traditional or optimized)
- Position of the answer options of single choice questions
- Color scheme
- Display of question numbering
- Text Templates and attachments for the overall report

Placeholders:

- Entries for the placeholder AUTHOR and COURSE are deleted
- The standard placeholders are reactivated

If the following characteristics apply to all questionnaire parts, they also apply to the questionnaire in total:

- Enable temporary save
- Evaluation for participants
  - Allow result access
  - Display answers to open questions
- Show print option
- Show certificate of participation

Further elements which are included in the complete module questionnaire:

- All PDF reports allowed for all questionnaires involved
- All languages defined for all questionnaires
- Filter questions are taken over from all questionnaires
- Cross tabulations, Required questions and PDF report plug-ins are taken over
- Online Design: If the display mode is set to “per chapter” for one of the questionnaires, then this view is taken over for the whole survey
- Validation (plausibility checks) is taken over
- Norms and Quality Guidelines are taken over from the corresponding questionnaire

7.5. Creating a Module Account

To create a module, click the button [Create New Module] located underneath the user list in the subunit. An input area will open which allows you to enter the data for the module.

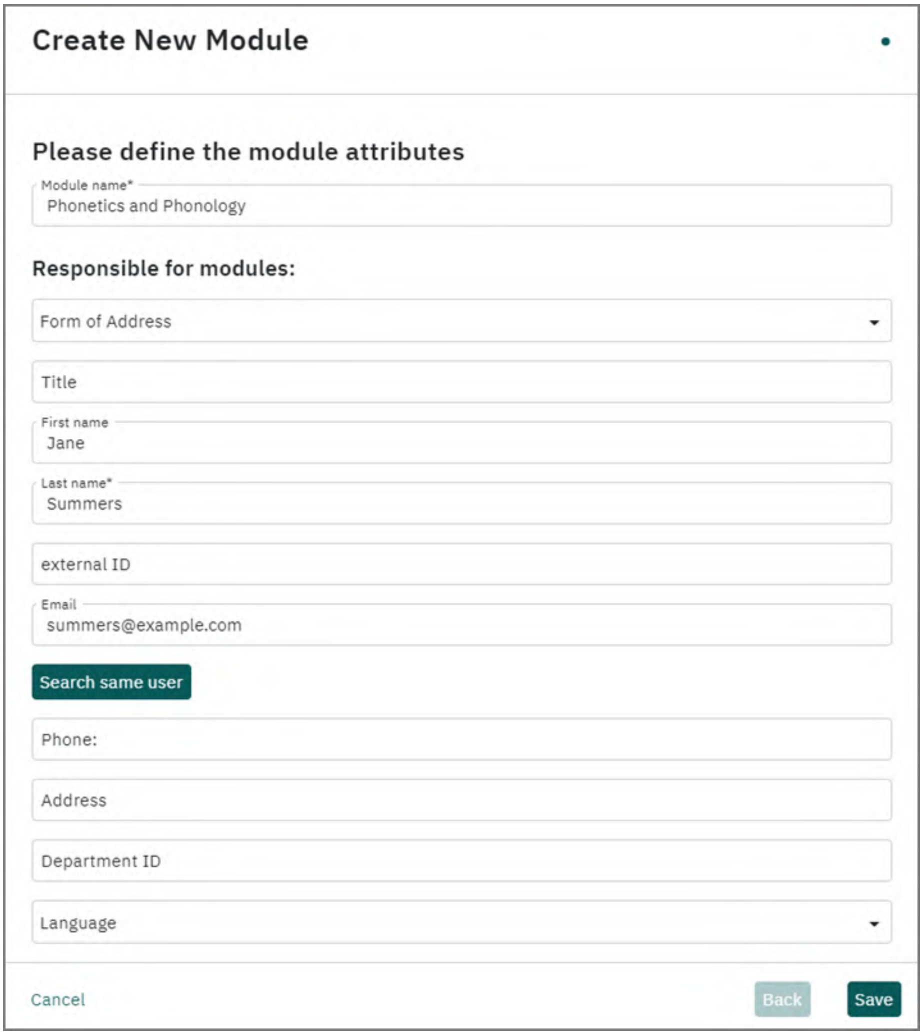


Figure 670: Creating a Module

Enter the name of the module in the upper area, and the data of the user responsible for the module in the lower area. This person will receive the report for the entire module.

Clicking [Save] will enter the module account into the user list. The name of the module is displayed in square brackets, followed by the name of the user responsible for the module.

Figure 671: Module in the User List

7.6. Creating module courses

Together with the module, a course is automatically created by the system (recognizable by the number [1] in the CO column). Click the number in the CO column to open the course list and have the course displayed. It carries the same name as the module.

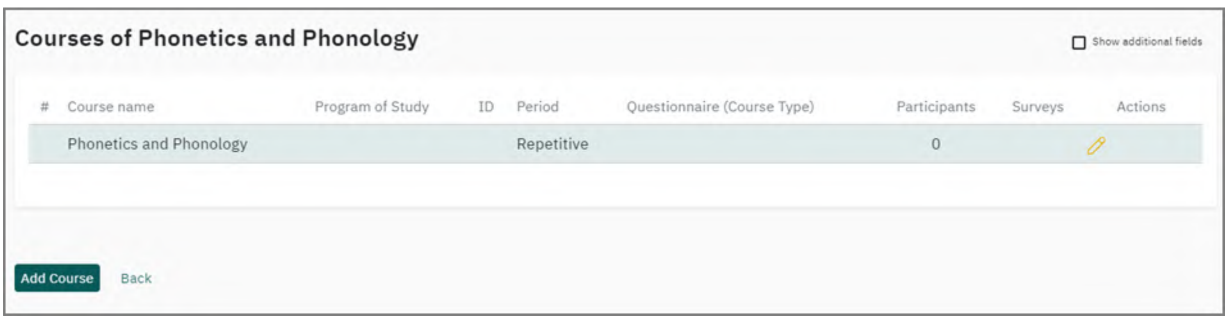


Figure 672: Module evaluation: Course for the module

This course is used to centrally save the settings that are valid for all the individual courses of the module. This includes:

- Number of participants
- Participant data
- Evaluations period
- Program of studies.

The participant data are stored in generally unique to the base event for all module parts. This is useful if all module participants attend all events of the module. If you have different groups of participants per module, you also have the option to deposit for individual module parts separately participant data. A corresponding configuration setting must be made. For more information see below.

Information in user-defined fields e.g. language and location are also taken on as presettings for further courses, but can be adapted at a later stage.

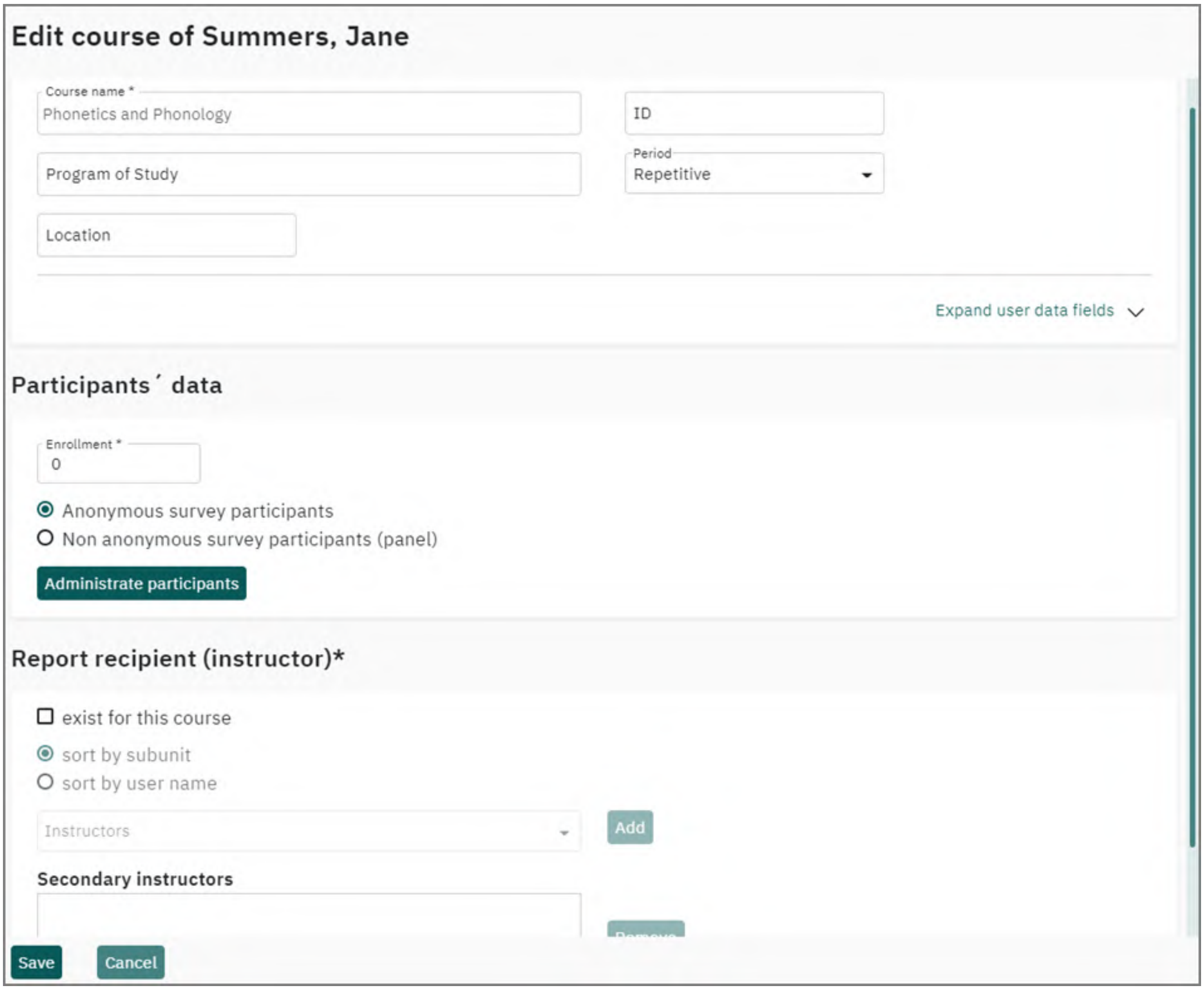


Figure 673: Module evaluation: Basic course

The individual module components can be assigned to the module in the form of courses. For this, click the [Add course] button underneath the course list.

Only the specific information on the respective course has to be saved for the individual module parts. In addition to the name of the course, two entries are especially important and necessary to ensure the module survey is carried out successfully:

- Select the questionnaire that you would like to use for the course's survey. You are only offered questionnaires that are linked with a type of course.
- Select the instructor/trainer who held the course in the “Report Recipient” section. The person who you enter in this field will receive the report for just this one course.

Please note:
As further report recipients you can only select persons, who already have a regular instructor/dean account in the system. If the intended report recipient does not exist as a user in evasys, you will have to create an instructor account for him so as to be able to choose him from the list.

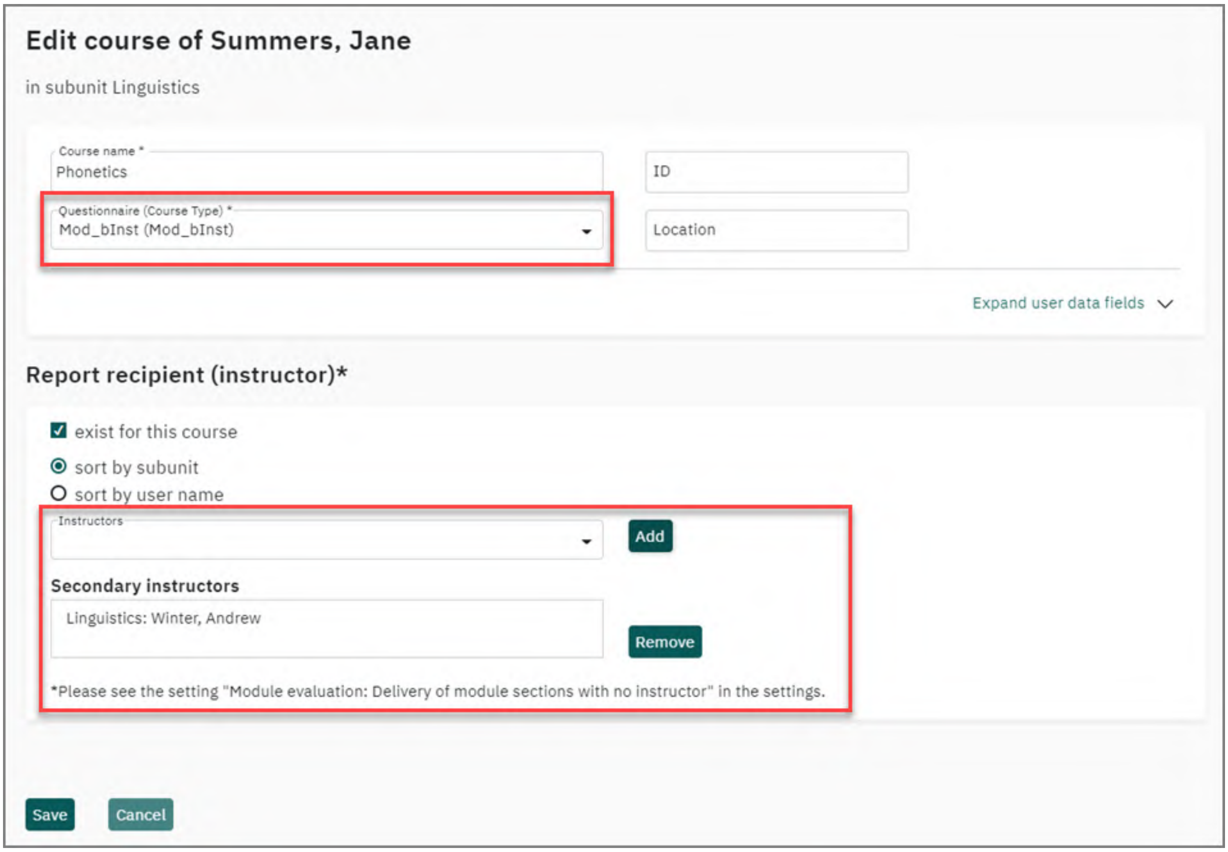


Figure 674: Module Evaluation: Entering Course Data

In the following example you can see the course list of a sample module “Phonetics and Phonology”. In this case, a “dummy” course called “General questions” for means of surveying general aspects concerning the whole module has been created as well as three regular courses. The “general course” is surveyed with a general questionnaire (course type “ModSem”), the single courses are surveyed with a trainer questionnaire (course type “ModInstr”). The order of the courses on the whole questionnaire corresponds to the order of the creation of courses. The order can be manually adapted with the yellow arrow on the right in the “Actions” section. A secondary instructor is assigned to each course, who will later on receive the report on his part of the survey.

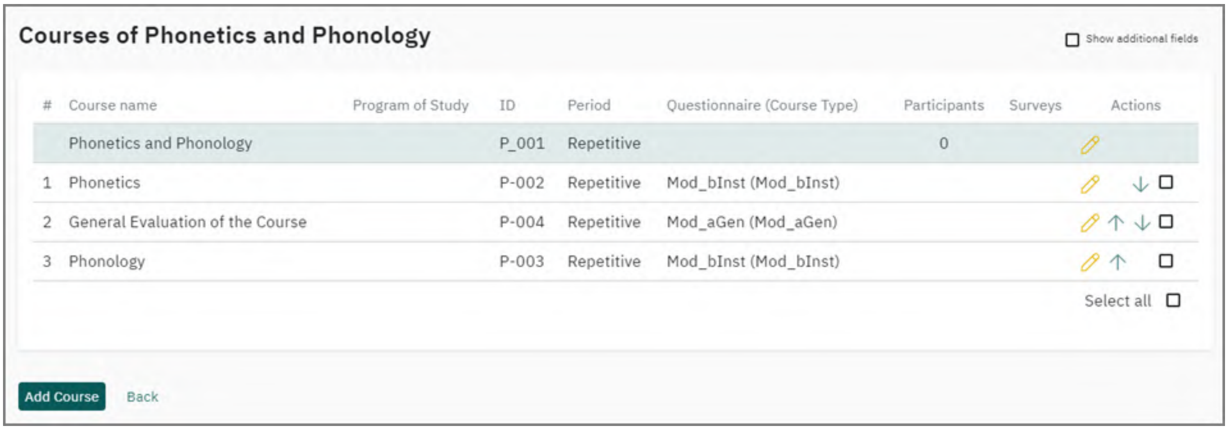


Figure 675: Module courses in the course list

Note:
The creation of a “dummy” course for questions concerning the whole module or general information on the participants allows you to survey these aspects only once on the questionnaire and not for every single course separately, which is one of the great benefits of module evaluation. But please be aware, that the possibility to create a subgroup analysis based on information of the general part of the questionnaire is only available for the whole questionnaire/survey. If you want to create a subgroup analysis for the single courses separately, you will have to create a subgroup analysis for the whole questionnaire and exclude questions concerning all courses except the one you want to create the analysis for.

7.7. Importing Modules and Courses

To prevent you from having to create all modules and courses manually, there is an option available for importing them into the system. You can use either XML files or CSV files to do so.

You can find out more about XML imports in our “XML Import Manual.” Importing via CSV is done in the same way as the standard import described in chapter B "". The following particularities apply for the module evaluation:

- The user type “module” has to be specified for the module in the USERTYPE column
- The module name is stored in a column with the column designation MODULE-NAME
- The position of the individual module course on the questionnaire can be specified by a numerical entry in the column MODULE_COURSE_POSITION; if no sequence is specified, the sequence of the module parts on the questionnaire corresponds to the import sequence
- The basic course of the module is identified by entry of the value 1 in the column MODULE_COURSE_MAIN; if no basic course is explicitly imported, it is created automatically by the system

- A clear identification must always be specified for all module parts (COURSE_CODE or TOPIC_CODE)

A sample CSV file could look like the following:

user-type	modu-lename	title	first-name	sur-name	email	course_name	course_code	course_type	mod-ule_course_position	mod-ule_course_-main
module	Bio-phys-ics	Mr.	John	Doe	jd@example.com	Bio-phys-ics	BP023_0	0		1
module	Bio-phys-ics	Mr.	John	Doe	jd@example.com	Mass trans-ports…	BP023_1	10	1	
module	Bio-phys-ics	Mr.	John	Doe	jd@example.com	Bose-Ein-stein...	BP023_2	11	2	
module	Bio-phys-ics	Mr.	John	Doe	jd@example.com	Elec-tric Mea-sure...	BP023_3	11	3	
module	Bio-phys-ics	Mr.	John	Doe	jd@example.com	Over-all feed-back	BP023_4	12	4	

Table 21: Sample CSV Import

Hint:
With module surveys, the actual instructor of the course is stored as report recipient for the course. If you wish to import the instructors, this can be done using the external ID of the instructor. For this, the instructor must be created with an instructor account in evasys, and have an external ID. The ID can be imported via a column with the designation SECONDARY_INSTRUCTOR_EXTERNAL_IDS. For use of external IDs, refer to section „Using External IDs“, on page 64

7.8. Generating Module Surveys

The generation of module surveys is done using the function “Subunits/Generate Surveys“. Select the checkbox “Switch to Module Surveys” to show selections for modules. You may generate either paper or online surveys.

Please note:
In contrast to common evaluation, you do not select the single courses you want to evaluate, but the module in total. Evasys will automatically create a survey which comprises all courses of your module.

Then choose the type of survey. Online surveys, paper and hybrid surveys can all be created.

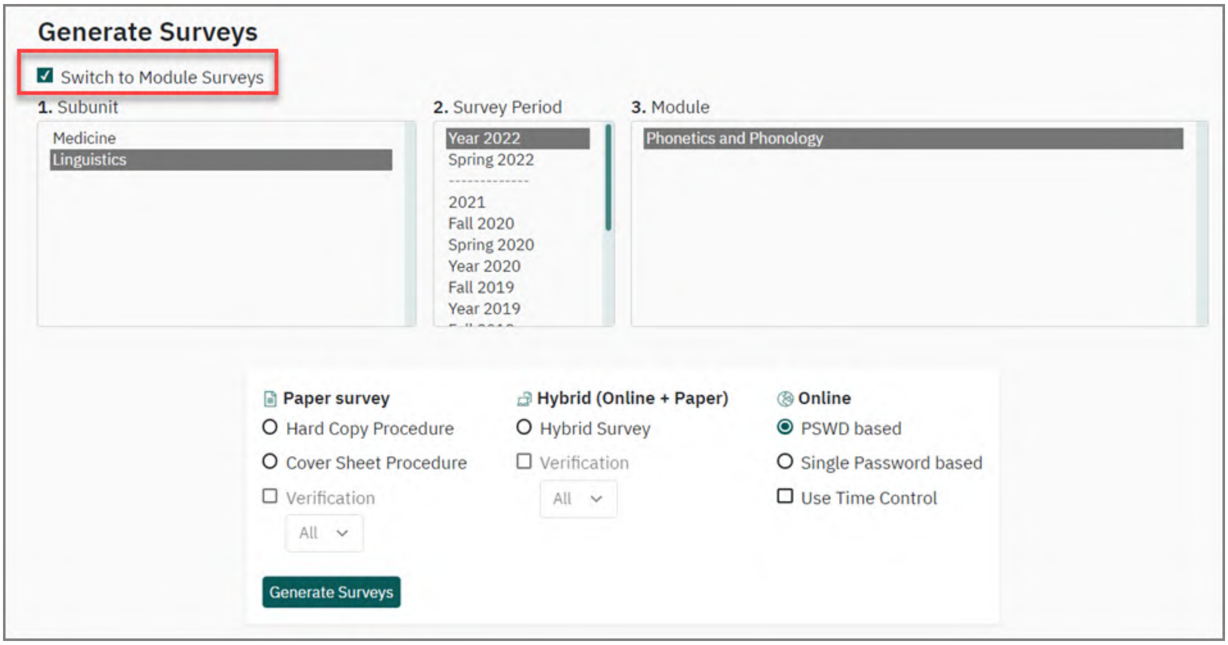


Figure 676: Generate Module Survey

The example shows an online survey. When the survey was generated, evasys combined all the sections of the module into a single questionnaire. The name of the questionnaire is random alphanumeric and eight characters long, in this example VJUTKC3E.

Figure 677: Module Survey in the List of Surveys

If you have generated a paper-based survey, please check the questionnaire by opening the PDF version before printing it. If the layout does not live up to your expectations, as, for example, the page breaks are located badly, delete the survey and edit the single questionnaires in the editor. After that, generate a new survey and check the results.

The newly created module questionnaire is now also shown in the list of questionnaires in the “System Settings” menu (in the archive folder).

Figure 678: Display Module Questionnaires in the List of Questionnaires

By clicking on the name of the questionnaire you can access its details and define further settings for your survey (for example, change the online design, edit the text templates etc.).

After all settings have been done, the survey can be conducted just like any other paper or online survey in evasys (i.e. print or email questionnaires or PSWDs, scan forms etc.).

Hint:
You can also use the tree structure to create module surveys (see chapter B 3.19.2. „Generating Surveys“). In the tree structure, select the option “Generate Surveys” and then activate the option “Switch to Module Surveys.” Then select the subunit, period, and module. For more information on the tree structure, see chapter B 3.19. „Tree Structure“.

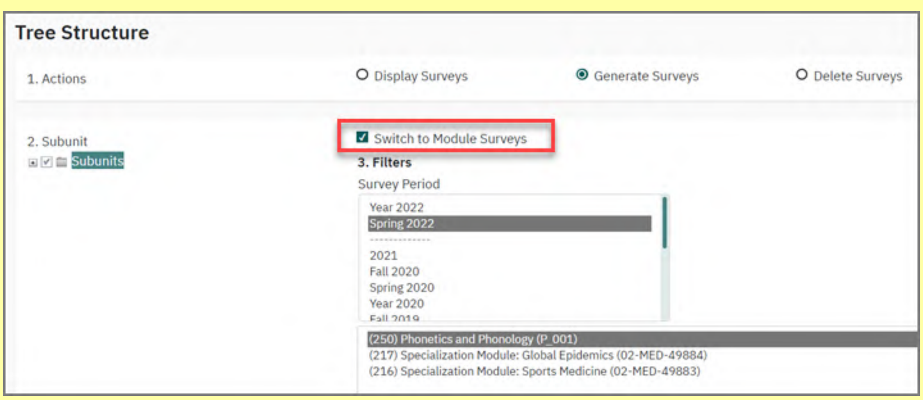


Figure 679: Module Evaluation: Creating Module Surveys using the Tree Structure

7.9. Instant feedback

As soon as the questionnaires have been scanned and analyzed by the VividForms Reader resp. the online survey participants have taken part in the survey, evasys will automatically generate reports on both the module survey in whole and all its single components (= courses, which have been surveyed).

In the following figure you can see the report on a module survey and all of its components. The report for the whole module has the name of the module (in this case “Phonetics and Phonology”). It can also be recognized by the name of the module questionnaire in the column “Form” (in this case “4D21R1Q2”).

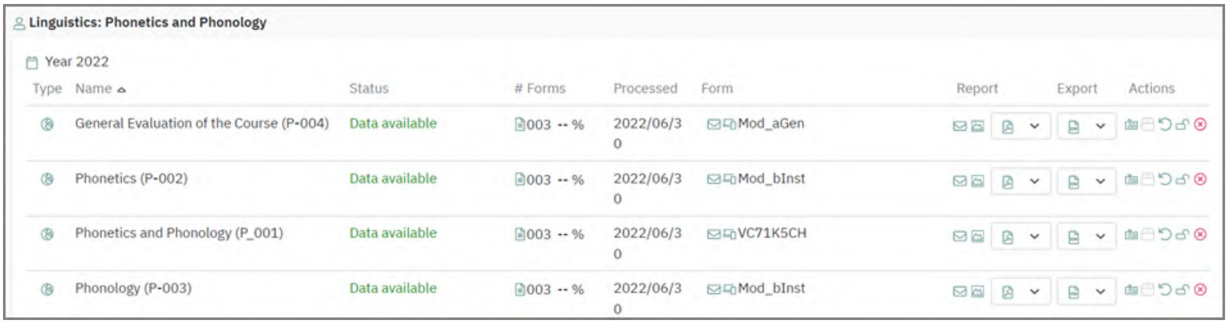


Figure 680: Module Evaluation: Overview of the Module Survey

Note:
When you have conducted an online survey, the list will at first only show the report for the whole module survey. Only after opening the PDF report for the whole survey or closing (and, if necessary, re-opening) the survey, the reports for the single parts of the survey will be created.

Sending immediate feedback

If the automatic report submission is activated, all recipients will receive a report by email. The person linked to the module account will receive the whole report, while those people linked as secondary instructors to single courses will receive their parts of the report only.

If there is a course which has no report recipient assigned to it, then the report will only be sent to the module coordinator when using the “Batch Events” or sending the report directly from the survey list. When sending reports via “Process Defaults” oder via “Scheduled Tasks” there are to possibilities to deal with such courses:

- the report for this part of the module is only sent to the module coordinator
- the report for this part of the module is sent to the module coordinator and to all report recipients defined for the different parts of the module.

The latter option can, for example, be useful when the course without a defined report recipient corresponds to a general survey part concerning the module in total and when the results are to be communicated to all persons involved.

The type of dispatch can be defined in the evasys Settings, menu “System Settings/ evasys Settings/Surveys/Module evaluation: Delivery of module sections with no instructor”. By default the option is activated, i.e. the report is sent to all recipients automatically.

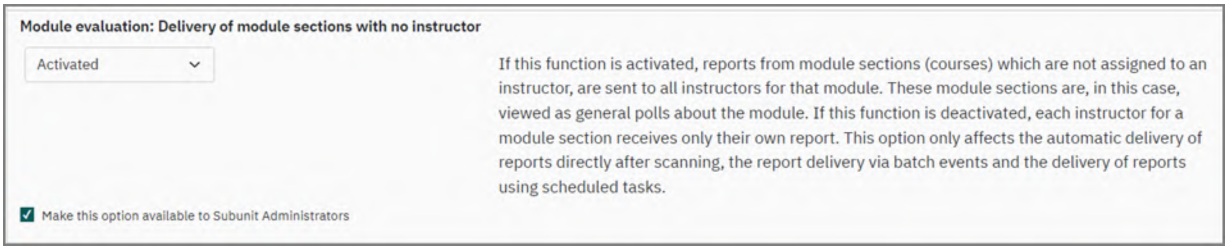


Figure 681: Module Evaluation: Delivery of Module Sections without Instructor

Before sending reports, the email text templates of the individual module questionnaires (individual reports) should be adjusted. The overall report uses the text templates of the first questionnaire part. To do this, enter the details menu for the questionnaire and select the option “Text Templates” under the heading “Advanced Settings”. Then choose the template titled “Results of a survey” from the list of text templates. You can then use the lower window to edit the email text.

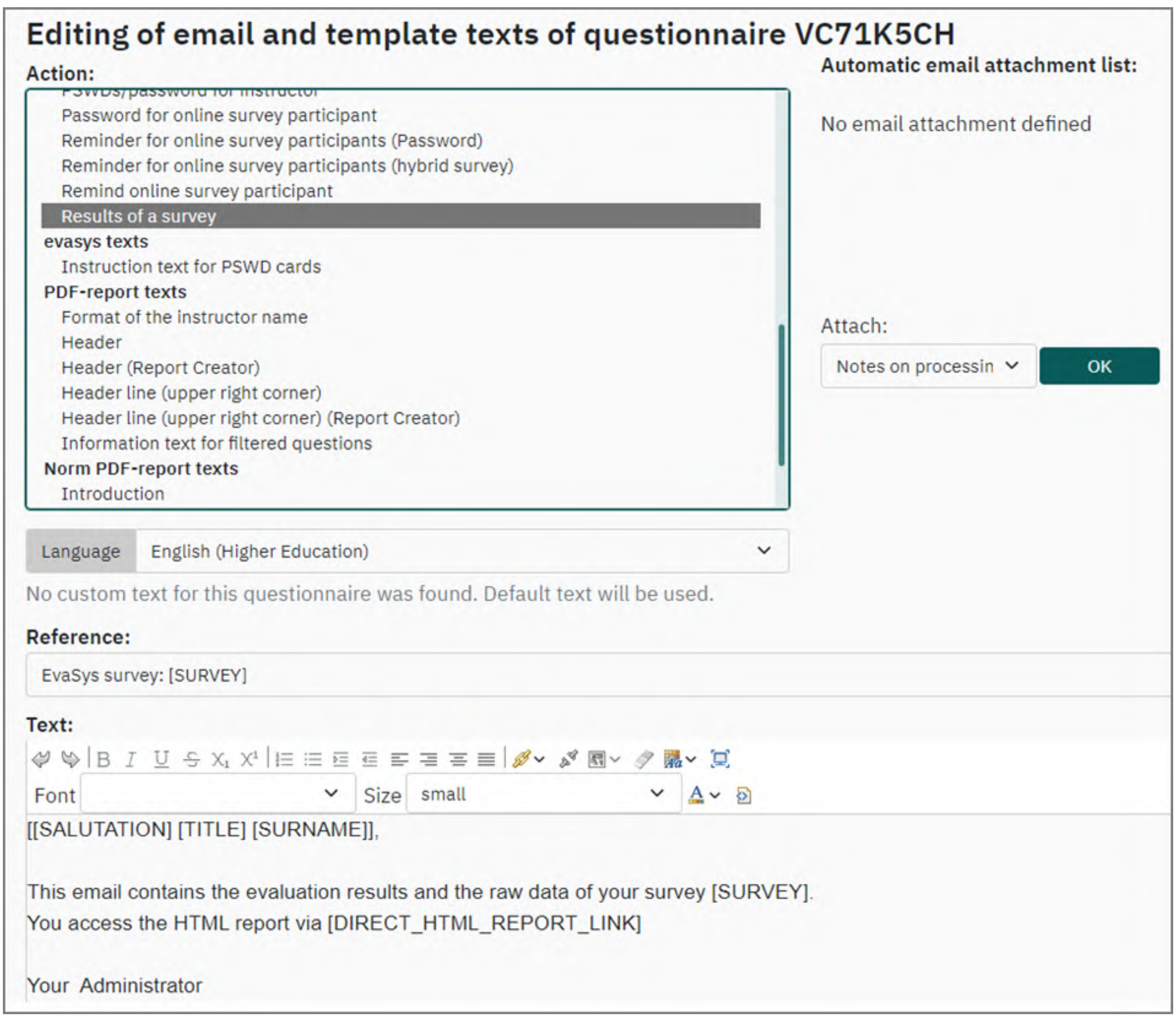


Figure 682: Module Evaluation: Editing Text Templates

The standard placeholder [SURVEY] is replaced with the name of the individual course for the module when the email is sent. If you also wish to include the name of the module in the email, you can use the placeholder [UNIT_NAME]. For more detailed information on editing text templates see chapter D 2.1. “Text Templates”.

Retrieving immediate feedback via active/passive instructor accounts

If the instructors/trainers who are stored as report recipients for the individual module parts have active or passive access to the evasys system, then they have the option of retrieving their reports from the centrally executed module surveys themselves. For this, activate the option “View reports as secondary instructor” at “System Settings/ evasys Settings/Data Privacy”, and check that the user has the basic authorization to retrieve reports from the central evaluation (at “System Settings/evasys Settings/Central Evaluation/Passive instructor: Login for report request resp. Active instructor: Access to reports from central evaluation”).

7.10. Further Settings

Several additional setting options for module questionnaires are available in the central evasys configuration (”System Settings/evasys Settings” menu). You will find the relevant options in den submenu “Survey”, tab “Module Evaluation”.

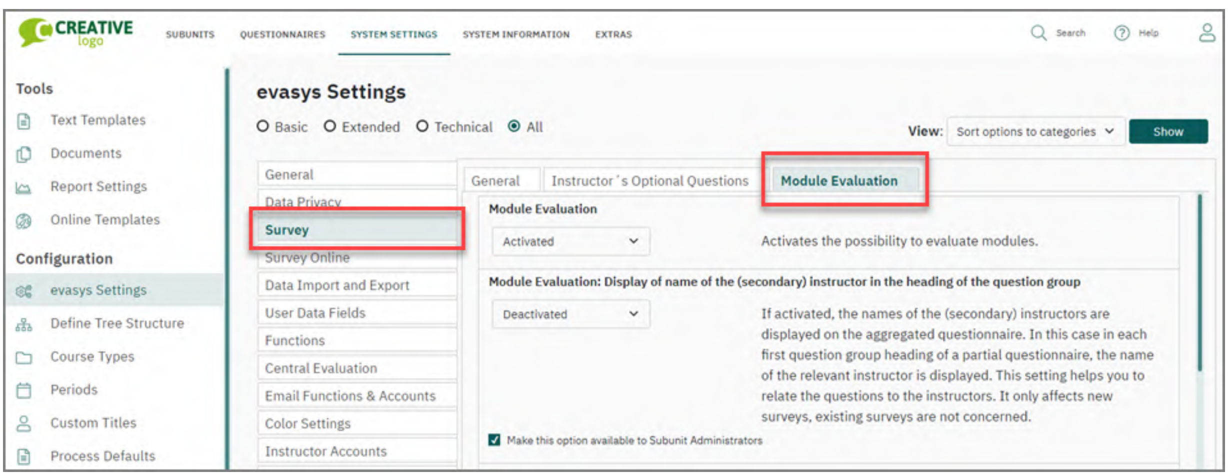


Figure 683: Module Evaluation - Settings

Display of the (Secondary) Instructor's name in the question group heading

By default, on a module questionnaire the names of the module courses will be displayed below the title of the first question group of the corresponding questionnaire part, so as your survey participants know which course has to be evaluated. If you want the name of the corresponding instructor to be displayed as well, there are two possibilities:

- At “System Settings/evasys Settings/Surveys” activate the option “Module Evaluation: Display of name of the (secondary) instructor in the heading of the question group “. In this way, the names are shown on the questionnaire and in the PDF report. Please note that this function is only effective when no more than one Secondary Instructor/Report Recipient is saved at a course. If there are two or more Secondary Instructors, no name is displayed for this course.

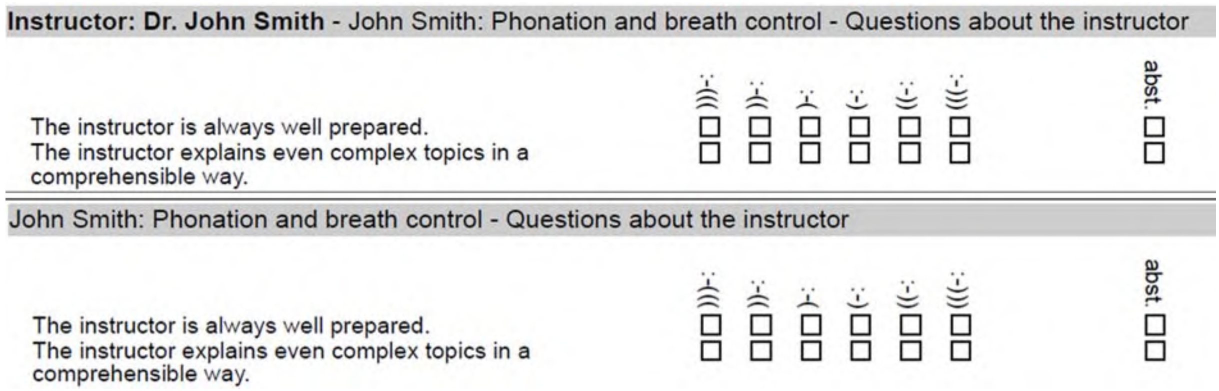


Figure 684: Module Evaluation: Instructor Name activated/deactivated

Hint:

If your questionnaire contains as first element an empty question group (only a space character), the name of the course will be inserted into this question group. This can improve the layout of your survey.

But if this question group neither contains questions nor images or text boxes, it will not be displayed in the PDF report. In the PDF report you will then not be able to distinguish the different courses! To avoid this, you will at least have to add an image or a text box to this question group. In case of using a text box enable the display of text boxes in the PDF report (menu “Report Settings/Configuration/Option: Show text boxes”).

- You can integrate the name of the instructor in the course name, for example “Lesley, John:”. Thus the name of the instructor will be displayed on the questionnaire as well as in the course list and survey list and on the PDF report. Please, remember to add the instructor to the list of “Further report recipients” as well, because otherwise the instructor will not receive his/her report when you choose to send them by email.

Figure 685: Module Evaluation: Instructor name in the Course Name Field

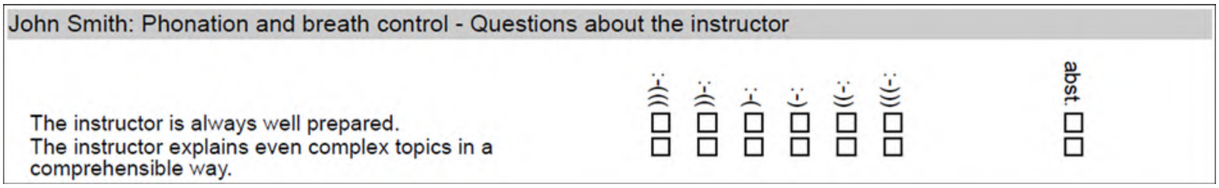


Figure 686: Module Evaluation: Instructor Name in the Course

Display of the question group name in the first question group header

The name of the question group is shown by default in all question group headings on the whole questionnaire of the module. If desired, the display of the first question group of any form segment can be switched off, so that only the name of the module course and, if required, the Instructor/Trainer is shown. To do this, deactivate at “System Settings/evasys Settings/Surveys” the option “Module Evaluation: Display the name of the question group in the first question group heading”.

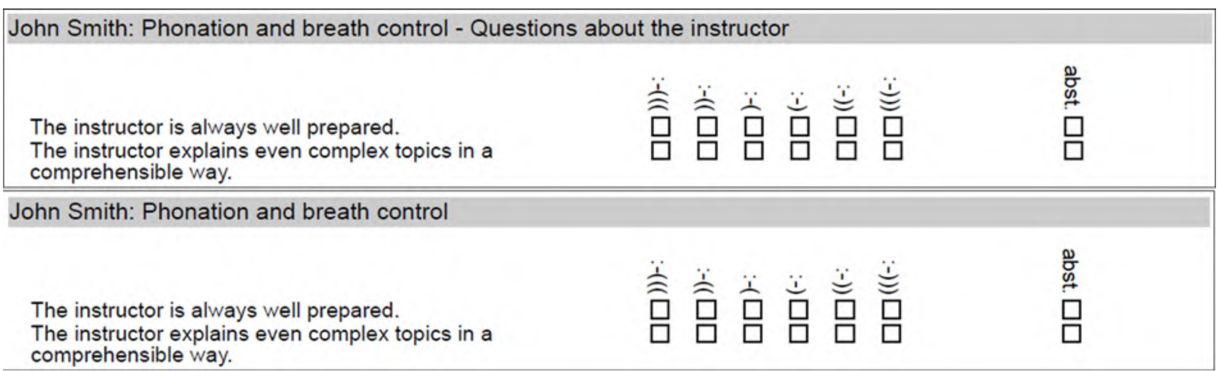


Figure 687: Module Evaluation: Question Group Title activated/deactivated

Line breaks in the first question group header

Line breaks are undertaken by default for long texts in question group headers If this is not desired, for instance to avoid displacements through additional lines, the line breaks can be deactivated at “System Settings/evasys Settings/Surveys/Module Evaluation: Line breaks in the heading of the first question group”.

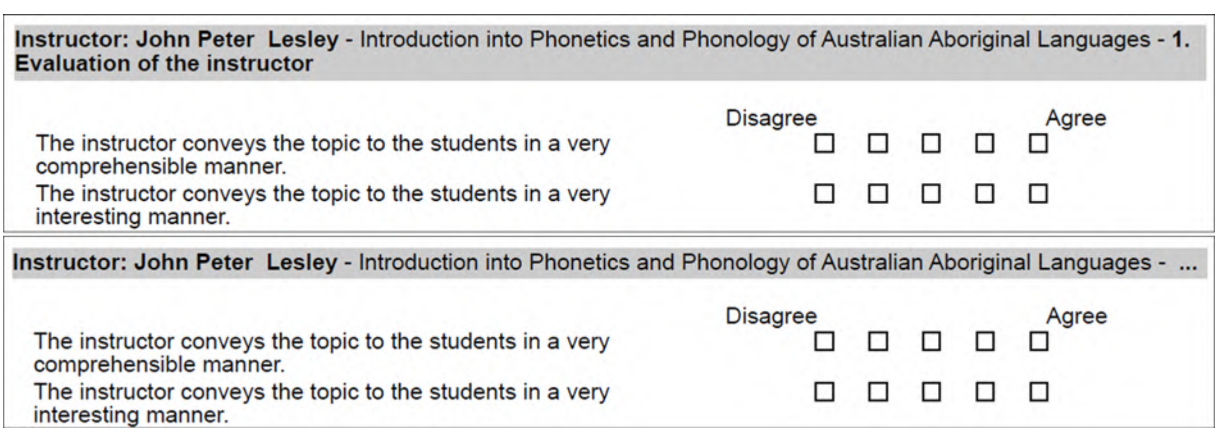


Figure 688: Module Evaluation: Line Break activated/deactivated

Sending module parts without instructor

Here, you can decide whether evaluations of module parts without any explicit report recipient should be sent to nobody or to all report recipients in the complete module. Always check this setting before you send away the first evaluations for your modules.

Manage participants separately for each module part (course/topic)

The participants are administered together for all courses of the module by default, i.e., participants only have to be imported or stored for the module's basic course. They are then automatically assigned to all parts of a course.

If desired, the participants can also be administered separately for every module part. For this, the corresponding button in the configuration has to be set to “Activated”.

When a module is now created manually, a button [Administer participants] appears in the window when creating a course/a topic. This is used to manually create the participants or upload them per CSV. With central CSV importing via the “Data Import” menu, participants have to now be uploaded for each part of the module. No participants can be imported or stored for the basic course.

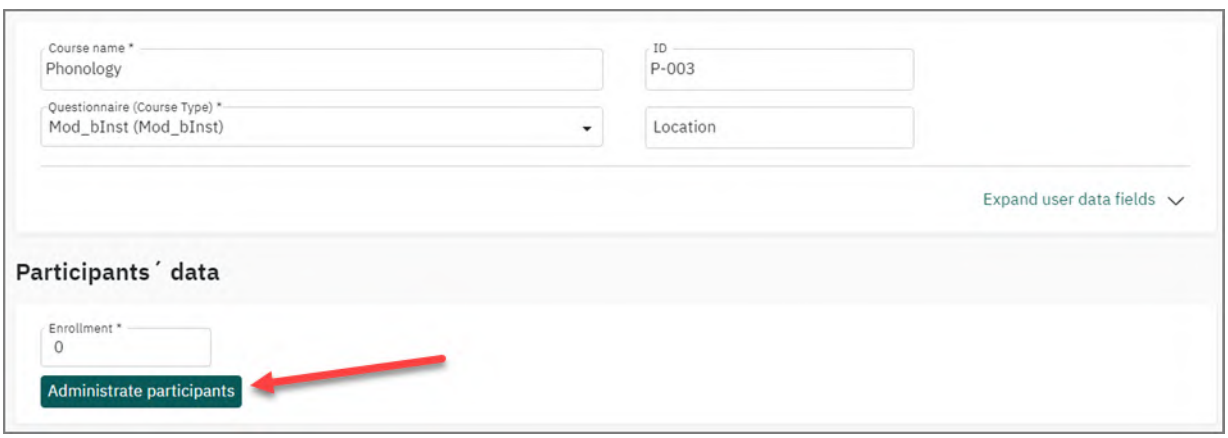


Figure 689: Module Evaluation - Import Participants per Module Part

By activating this function, you have the option to store individual module parts for different participant groups. If your module consists of, for example, a lecture, a seminar, and three exercises, whereby all participants attend the lecture and the seminar, but only one of the three exercises each, then for the exercises you can only store the participants who actually attended them. If, subsequently, you create a PSWD-based online survey, and send the PSWDs to the participants per email, then the system checks using the email address, in which module parts the person is stored as participant, and only displays the questionnaire parts that are still relevant. Therefore, if a participant has only attended one of the three exercises, s/he can only see the questions on this one exercise.

The automatic filtering of the module questionnaire for individual participants functions both for online surveys and paper surveys. With online surveys, the questions that do not apply are hidden; with paper surveys, the complete questionnaire is printed out and issued, but when scanning-in, only those module parts are considered in the evaluation, for which the person filling out is stored as participant.

The prerequisite for filtering is that the participant data is imported for the individual courses, and that the system can create a link between participant and questionnaire. This link can take place under the following conditions:

- Online surveys: A PSWD-based online survey is created and the PSWDs are sent by email to the participants. When opening the online survey, the system uses the email address to check which module parts the participant is stored for, and displays the questionnaire accordingly. The survey can be carried out anonymously or non-anonymously. It is only important that the email addresses of the participants are imported in advance. For anonymous surveys, there is no longer any link between data set and participant after sending. This means that the survey remains completely anonymous.
- Paper surveys: The module parts must be created as non-anonymous courses, and non-anonymous participant data has to be imported. The participant information has to be stored on the questionnaire via placeholders, so that personalized questionnaires can be issued to the participants. When scanning in, the system checks which module parts are assigned to the participant, and takes on only the relevant data.
- Hybrid surveys: The hybrid survey has to be created non-anonymously in the same way as the paper survey. The questionnaires can be issued personalized, or the PSWDs sent per email.

Please note: In all other cases (anonymous paper/hybrid surveys, password-based online surveys, PSWD-based online surveys without sending PSWDs), the questionnaire cannot be filtered automatically for the participants. In such cases, the complete questionnaire is always displayed, and all the data is taken on in the evaluation.

C. Calculations

The following chapter explains important formulas and calculations used in evasys. For each formula, it explains the general meaning and its mode of calculation. It also describes the context in which this formula is used in evasys.

Be advised that the raw data can be exported from evasys into statistical packages for further analysis. Evasys offers an automated export function to SPSS and Excel. Further export information can be found in chapter B 5.3. "Data Export to Excel/SPSS/Sphinx".

1. Calculation of Mean Values

The calculation of mean values is one of the most common computations in evasys and is relevant in many situations.

The standard PDF report includes mean values as part of the individual analysis of the different questions. Also, indicators and overall indicators are given in terms of mean values; though these summarize structures that go beyond individual questions.

Other examples for calculations of mean values in evasys that report creators can use are: producing weighted or unweighted compilations; adding an additional profile line for the overall average of several profile lines to a profile line report.

The following sections explain the two procedures of mean computation used in the PDF report, the standard computation of the mean and the trimmed arithmetic mean (sections 2.1. and 2.2.). Sections 2.3. and 2.4. discuss the computation of indicators and the overall indicator.

1.1. Arithmetic Mean

The arithmetic mean is the average of a series of measurements. It is calculated by adding up the individual values and then dividing this sum by the number of values:

$$\bar{x}_{\mathrm{arithm}} = \frac{1}{n}\sum_{i=1}^{n} x_i = \frac{x_1 + x_2 + \cdots + x_n}{n}$$

Example Calculation:

The arithmetic mean for a series of measurements of 8 responses to a scaled question with 6 answer options is calculated as follows:

Sum up values of responses: *3 + 1 + 6 + 4 + 4 + 3 + 4 + 6 = 31*

Divide sum by number of responses: *31 / 8 = 3.875*

The arithmetic mean is 3.875. In the PDF report the mean is shown as 3.88 or 3.9.

Hint:
In the menu “System Settings/Report Settings/Configuration/Decimal point precision average/standard deviation” the number of decimal places for mean values and standard deviations can be set. You can choose between one and two decimal places.

If activated (menu “System Settings/Report Settings/Configuration/Show average/median”) the arithmetic mean is displayed in two ways in the PDF report:

- as numeric value (av.= ...),
- in the histogram as vertical red line in the graph.

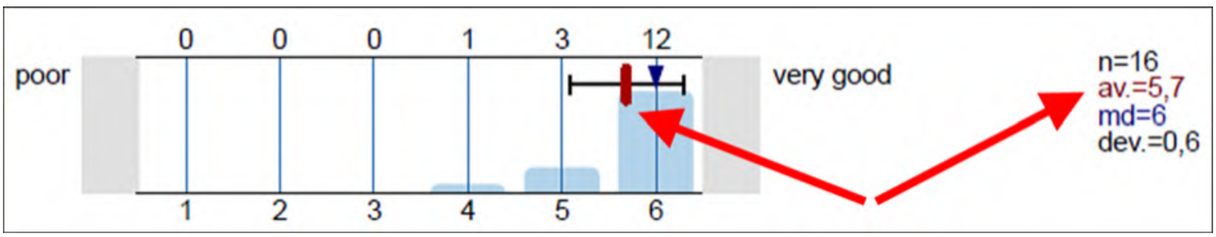


Figure 690: Display of the Arithmetic Mean in the PDF Report

Note:
The mirroring of scales (in the questionnaire details) affects the calculation of the mean.

1.2. Trimmed Arithmetic Mean (“Trimmean”)

A trimmed mean is a mean which is calculated disregarding a certain proportion of the most extreme values. These values are the observations at the top and bottom end of the distribution (outliers). By excluding them from the calculation, these extreme values do not influence the mean.

In the PDF report in evasys, an arithmetic mean that is trimmed by 10% (trimmean) can be chosen as an alternative to the arithmetic mean. When calculating the trimmed mean, the top and bottom 5% of values are excluded. In the PDF report configuration, the trimmed mean can be chosen under “Procedure to calculate the mean value”.

In the PDF report, the trimmed mean is indicated by “tm” instead of “av”.

1.3. Indicator

An indicator in evasys is the overall mean of a question group of scaled questions. It is calculated by adding up all response values to all scaled questions of this question group and then dividing this sum by the number of responses given.

Below is an example for the calculation of an indicator for a question group with 6-point scaled questions:

Questions in Question Group	Number of Valid Responses	Values of Responses	Mean Value
Question 1	5	3, 4, 2, 5, 4	3.60
Question 2	4	1, 4, 2, 4	2.75
Question 3	3	5, 6, 5	5.33
Indicator = (3 + 4 + 2 + 5 + 4 + 1 + 4 + 2 + 4 + 5 + 6 + 5) / 12 = 3.75			

Table 22: Calculation of an Indicator

Note:
It has to be stressed that the indicator is **not** calculated by averaging means computed for the individual scaled questions. In this case, responses would not be weighted according to the number of valid responses given to each question, resulting in a different value (in the above example this would be (3.60 + 2.75 + 5.33) / 3 = 3.89).

1.4. Overall Indicator

The overall indicator is the overall mean value of a survey.

As opposed to the indicator for question groups, the overall indicator does not represent the mean of all response values. Instead, the overall indicator is computed by adding the indicators for the question groups together and dividing the result by the amount of indicators.

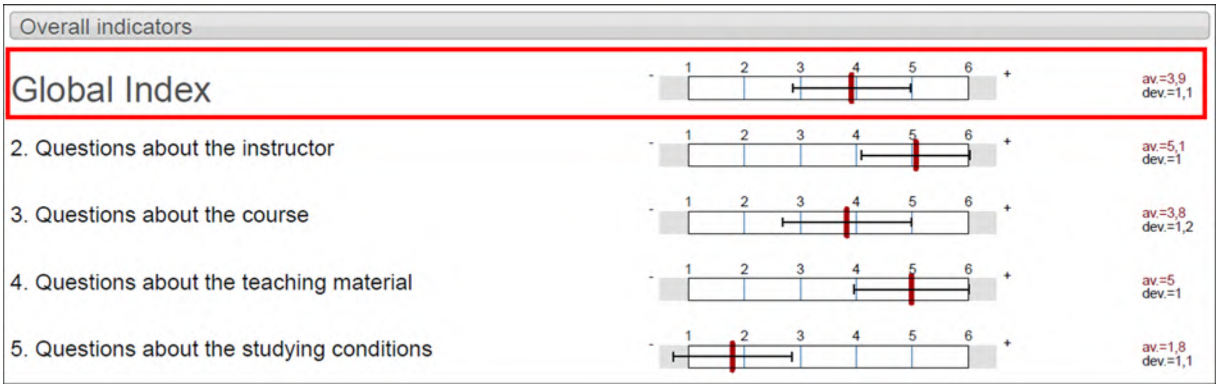


Figure 691: Overall Indicator

Note:
The overall indicator is computed by using the original indicators for question groups and **not** with rounded indicators for question groups, as shown in the report.

Note:
It is only meaningful to calculate an overall indicator if all question groups with scaled questions use the same number of answer options (e.g. only questions with a 4-point-scale).

The number of decimal places can be set in the PDF report settings (menu “System Settings/Report Settings/Configuration/Decimal point precision average/standard deviation”. Here one or two decimal places can be chosen.

1.5. Standard Deviation for Indicators

It is possible to calculate the standard deviation for indicators in two different ways. There is a corresponding setting in “System-Settings/evasys Settings/Survey/General“:

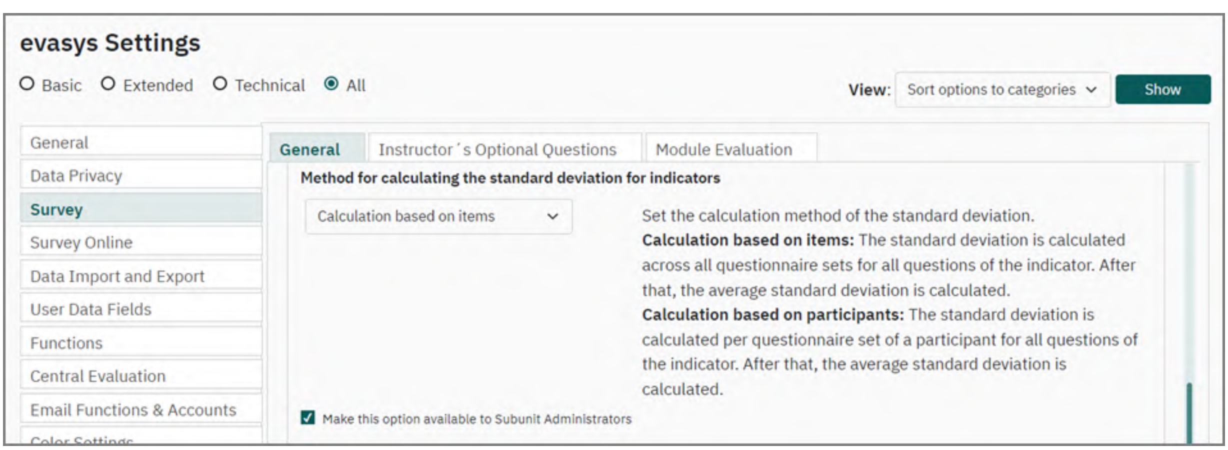


Figure 692: Method for calculating the standard deviation

If this switch is set to “0“, the standard deviation is calculated on item base. In other words: It is calculated over the mean of all questions of an indicator, over all results. The following formula applies:

$$StdDev_{Indicator} = \frac{\sum_{m=1}^{M} StdDev_m}{M}$$

M = Amount of questions in the indicator.

If the setting “1“ is applied, the standard deviation is calculated on participant base. In other words: It is calculated by generating the squared deviations for the items of the indicator per single result/participant.

The following formula applies:

$$s = \sqrt{S^2} = \sqrt{\frac{\sum_{i=1}^{n}(x_i - \bar{x})2}{n}}$$

Note:
For unweighted reports of the report creator which were generated in an earlier version than evasysV7.1, only the item based calculation is possible. If the option is set to “1“, the standard deviation for indicators is always “0“.

2. Cronbach’s Alpha

In evasys, Cronbach’s Alpha describes the internal consistency of a question group. This value indicates whether the items of a question group are meaningfully related to each other and can thus be seen as capturing the concept the question group is meant to measure.

Note:
Cronbach’s Alpha cannot be calculated for the free indicators, which can be defined in the details of a questionnaire.

Note:
A respondent needs to have answered all questions of a question group in order for his or her response values to be considered in the calculation of Cronbach’s Alpha.

Cronbach’s Alpha can range between minus infinity and 1; however only positive values have a meaningful interpretation. A value of 0 means that the items (i.e. questions) are not associated which each other at all. A value of 1 would be the strongest relationship between questions that is possible. In general, with a value of 0.7 or above the scale (i.e. question group) can be considered as reliable.

The table below gives a guide how different values of Cronbach’s Alpha can be interpreted:[1]

Cronbach’s Alpha Value	Interpretation
> 0.9	Excellent
> 0.8	Good
> 0.7	Satisfactory
> 0.6	Questionable
> 0.5	Poor
< 0.5	Unacceptable

Table 23: Interpretation of Cronbach’s Alpha

Note:
The value of Cronbach’s Alpha increases automatically when
- question wording differs only superficially from each other
- a question group has a large number of questions; in this case the statistic has to be interpreted with care

When activated in the PDF report settings, Cronbach’s Alpha is given in the PDF report for each indicator (menu “System Settings/Report Settings/Configuration/ Cronbach’s Alpha”). Cronbach’s Alpha can only be displayed if the indicators of the corresponding questionnaire have been defined previously.

Figure 693: Display of Cronbach’s Alpha in the PDF Report

Note:
In evasys the regular, non-standardized Cronbach’s Alpha is used, which is calculated from the variances and co-variances of the questions within a question group.

evasys calculates Cronbach’s Alpha with the following formula:

$$\alpha = \frac{N \cdot \bar{r}}{1 + (N-1) \cdot \bar{r}}$$

(N = number of items (i.e., questions in question group) and = ratio of covariance : variance (average correlation between items))

1. *see* George, D., & Mallery, P. (2003). *SPSS for Windows step by step: A simple guide and reference. 11.0 update* (4th ed.). Boston: Allyn & Bacon.

In order to determine $\bar{r}$, the covariance for all possible combinations of questions is calculated, as well as the variance for all questions of the question group. The resulting values are averaged and the ratio between them is determined in order to calculate the average correlation between the questions in the question group.

In order to calculate the covariance for each question of the question group, the difference of the given responses to the respective arithmetic mean is calculated. These values are multiplied for all possible combinations of questions and their sum divided by n – 1 (n = number of responses):

$$s_{xy} = \frac{1}{n-1}\sum_{i=1}^{n}(x_i - \bar{x})(y_i - \bar{y})$$

The variance corresponds to the sum of the squared differences of the response values to their respective arithmetic mean value, divided by n – 1 (n = number of responses):

$$s^2 \text{ (oder } \hat{\sigma}^2\text{)} = \frac{1}{n-1}\sum_{i=1}^{n}(x_i - \bar{x})^2$$

3. Median and Other Quantiles

The median divides a distribution into two halves, i.e., it is the value which is exactly in the middle of the set of values.

For a scaled question in evasys, this means that in 50% of cases a response value that was more positive or exactly equal to this value was given. The remaining 50% of values are either more negative than this value or again equal to it. An advantage of the median over the arithmetic mean is that it is not influenced by few extremely high or low response values. In other words, the median is robust against outliers (values that deviate extremely).

If activated, the median is displayed in the PDF report in two ways (menu “System Settings/Report Settings/Configuration/Show average/median“):

- as numerical value (md = ...),
- in the histogram as blue arrow in the graph.

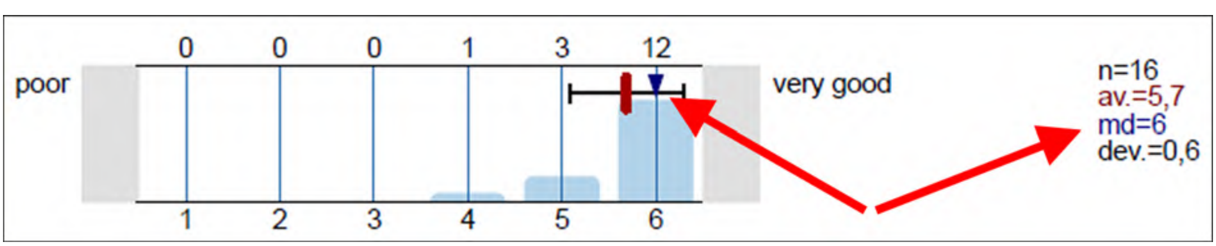


Figure 694: Display of the Median in the PDF Report

As the median is a specific quantile which describes the middle of a frequency distribution, it is also called the 0.5 quantile or 50%-quantile.

In the Report Settings, under “Show quantile”, you can also choose 10% quantiles (deciles) or 25% quantiles (quartiles). In the case of deciles, the distribution is divided into 10, in the case of quartiles into four parts. (Hence, the median is equal to the fifth 10% quantile or the second 25% quantile.)

A boxplot is shown in the histogram for scaled questions. The rectangle indicates the area between the bottom and top quantile; i.e. in the case of the 25% quantiles it marks the middle 50% of response values (interquartile range), the bottom and top 25% are outside this area.

The two lines to the right and left of the rectangle are the so-called whiskers and mark the minimum and maximum. In the example the minimum = 4 and the maximum = 6.

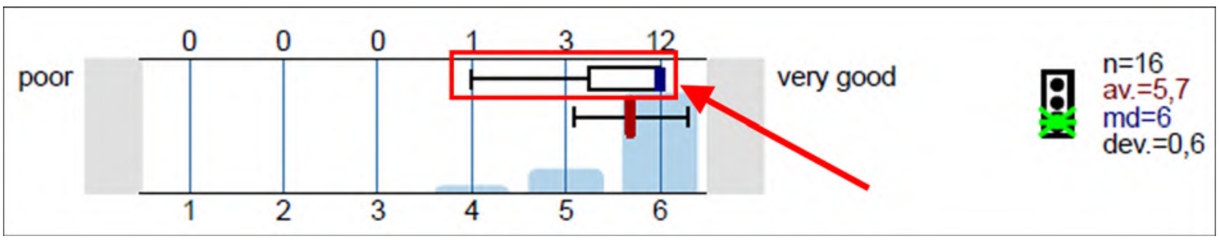


Figure 695: Display of 25% Quantiles in the PDF Report

With deciles, the rectangle indicates the middle 80% of values, leaving the bottom and top 10% to the left and right.

About the Calculation of Quantiles

All quantiles in evasys are calculated as follows:

Calculate auxiliary quantity k:

$$k = [\alpha \cdot (n+1)]$$

(α = quantile factor (e. g. 0.25 and 0.75 for the 25% and 75% quantiles, and 0.1 and 0.9 for the 10% and 90% quantiles) and n = number of responses)

If the auxiliary quantity k is a decimal number it is rounded down to the integer.

Formula for calculating any quantile:

$$q_\alpha = (1-w_{\alpha,k}) \cdot x_{k:n} + w_{\alpha,k} \cdot x_{(k+1):n}$$

with the weight $w_{\alpha,k} = \alpha \cdot (n+1)-k$

(Note: $x_{i:n}$ is the value x in the ordered set of data at the place i)

Example Calculation:

Following the above formula, the median (50% quantile) of a set of data comprising 8 *responses (3,1,6,4,4,3,4,6) for a scaled question with six answer options is calculated as follows*

Order response values in ascending order: 1, 3, 3, 4, 4, 4, 6, 6

*Calculate k: [0.5 *(8+1)] = 4.5*

Round k down to next integer: k = 4

*Calculate weight: wak = 0.5 * (8+1) – 4 = 0.5*

Calculate median (0.5 quantile) by inserting the values into the formula:

*q0.5 = (1 – 0.5) * x4:8 + 0.5 * x5:8 [–> x4:8 = fourth value in ordered set; x5:8 = fifth value]*
*q0.5 = (1 – 0.5) * 4 + 0.5 * 4*
q0.5 = 4

Example Calculation:

Proceed as follows in order to calculate the 25% quantile for a series of measurements of 24 responses according to the above formula:

Order response values in ascending order: 1, 1, 1, 1, 1, 2, 3, 3, 3, 3, 3, 4, 4, 4, 4, 4, 4, 4, 5, 5, 5, 5, 5, 5

*Calculate k: [0.25 *(24+1)] = 6.25*

Round k down to next integer: k = 6

*Calculate weight: wak = 0.25 * (24+1) – 6 = 0.25*

Calculate quantile by inserting the values into the formula:

*qo.25 = (1 – 0.25) * x6:24 + 0.25 * x7:24 [–>x6:24 = sixth value in the ordered set; x7:24 = seventh value]*
*qo.25 = (1 – 0.25) * 2 + 0.25 * 3*
qo.25 = 2.25 is the value of the 25% quantile

*Calculate k: [0.75 *(24+1)] = 18.75*

Round k down to next integer: k = 18

*Calculate weight: wak = 0.75 * (24+1) – 18 = 0.75*

Calculate quantile by inserting the values into the formula:

*qo.75 = (1 – 0.75) * x18:24 + 0.75 * x19:24 [–>x18:24 = eighteenth value in the ordered series; x19:24 = nineteenth value]*
*qo.75 = (1 – 0.75) * 4 + 0.75 * 5*
qo.75 = 4.75 is the value of the 75% quantile

Note:
The mirroring of scales (in the questionnaire details) affects the calculation of the median or other quantiles.

4. Standard Deviation

The standard deviation describes how the values of a series of measurements are spread around the mean. The standard deviation is the square root of the variance. The variance describes the average of the squared differences of the measurements from the mean.

As the standard deviation is not a squared value it is easier to interpret in relation to individual values than the variance.

$$\sigma_X = \sqrt{\frac{1}{n-1}\sum_{i=1}^{n}(X_i - \bar{X})^2}$$

Example Calculation:

To calculate the standard deviation of a set of 8 responses (3,1,6,4,4,3,4,6) to a scaled question with 6 response options according to the formula given above, proceed as follows:

Calculate the sum of the squared differences of each of the values to the mean: (3 – 3.875)2 + (1 – 3.875)2 + (6 – 3.875)2 + (4 – 3.875)2 + (4 – 3.875)2 + (3 – 3.875)2 + (4– 3.875)2 + (6 – 3.875)2 = 18.875

Divide the sum by (n -1): 18.875/7 = 2.696

Take the square root from 2.696

The standard deviation is 1.642.

If activated, the standard deviation is displayed in two different ways (menu “System Settings/Report Settings/Configuration/Show standard deviation as number” and “Show standard deviation in graph”):

- as numerical value (dev. = …),
- in the histogram as a black bar.

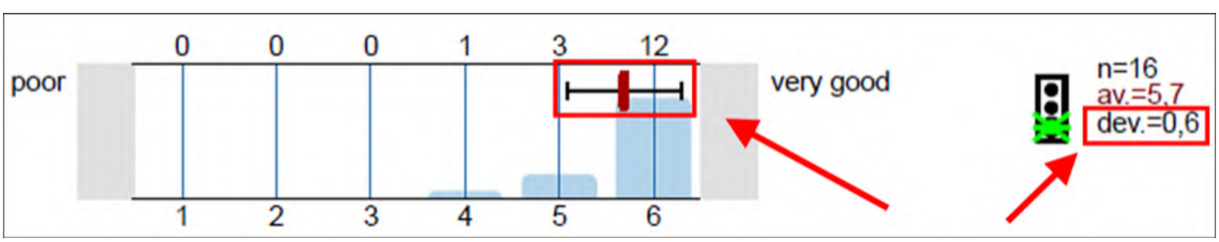


Figure 696: Display of the Standard Deviation in the PDF Report

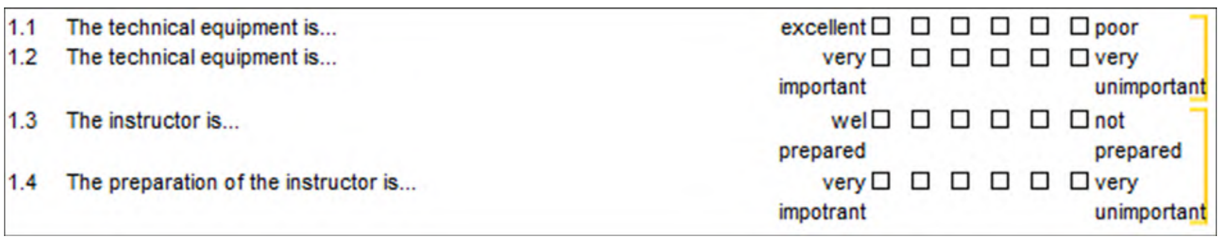
The number of decimal places can be set in the PDF report settings for standard deviation and mean together. This is done at “System Settings/Report Settings/Configuration/Decimal point precision average/standard deviation”. Here one or two decimal places can be chosen.

5. Calculation of Dual Scale Questions

Dual scale questions consist of two separate scaled questions. Apart from being individually analyzed, they will be also analyzed in combination. There are three types of dual scale questions, each of them with a specific kind of analysis: Quality and Importance, Target-Performance-Comparison and Outcome-based Evaluation. The evaluation of the three different types is explained in the following chapters.

5.1. Quality and Importance

In this dual scale type, the first question is used to assess a quality, while the second question is used to assess the importance of that quality.



1.1	The technical equipment is...	excellent	☐ ☐ ☐ ☐ ☐ ☐	poor
1.2	The technical equipment is...	very important	☐ ☐ ☐ ☐ ☐ ☐	very unimportant
1.3	The instructor is...	wel prepared	☐ ☐ ☐ ☐ ☐ ☐	not prepared
1.4	The preparation of the instructor is...	very impotrant	☐ ☐ ☐ ☐ ☐ ☐	very unimportant

Figure 697: Dual Scale Questions

Dual scale questions are used in order to evaluate whether there is actually a need for improving the quality or not. For example, if a quality is rated as poor by many respondents, but at the same time also as completely unimportant, there is no need for action. However, if they assess this quality as very important, improvements should be made urgently.

Example of Use:

Dual scale questions lend themselves particularly well to collect information on measures or changes that have been implemented or to identify relevant areas for improvement in advance:

For example, if an organization recently set up a new computer lab, a dual scale question as in Figure 697: "Dual Scale Questions" could be used to ask about its technical equipment.

If the importance of the technical equipment is deemed unimportant by many respondents, it is clear that there is no need to invest any further into it; maybe it is hardly used…

Note:
Dual scale questions can only be produced for questions with 4- to 6-point scales.

The value of a dual scale question results from the difference of the response values to both questions, i.e. the result of the question about the importance (b) is deducted from the result to the question about quality (a). For example, when both questions have a six-point scale, the possible range of values of this difference is between -5 and +5.

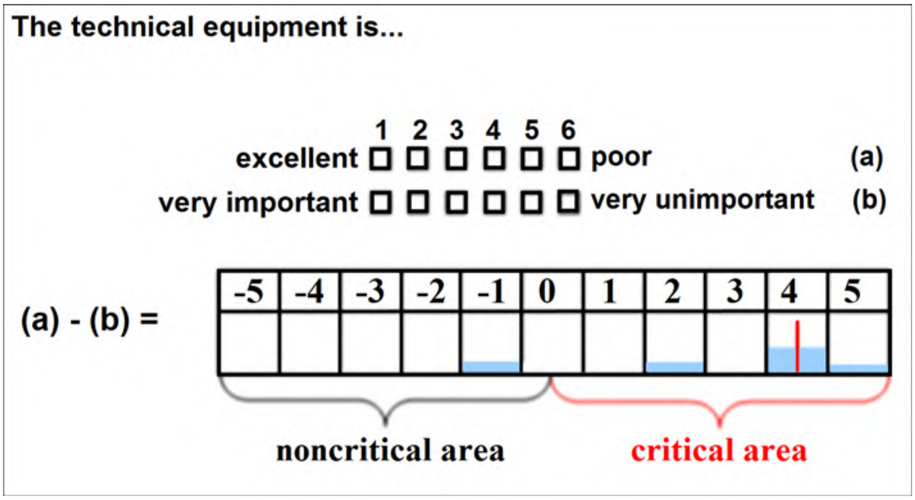


Figure 698: Possible Range of Values for a Dual Scale Question Consisting of 6-Point Scaled Questions

Example Calculation of Extreme Values:

With a 6-point scaled question the most critical combination a respondent could tick would be:

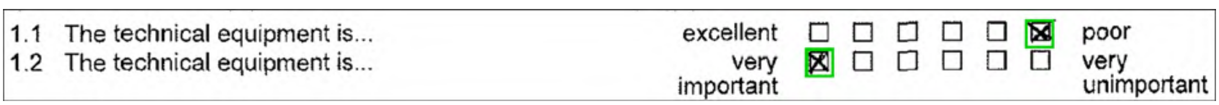


Figure 699: Example of a Dual Scale Question (1)

This means that the respondent evaluates the quality as very poor and at the same time the technical equipment is very important to him. Calculation of the extreme value: (a-b) = (6-1) = 5

This means that “5” is the most critical value that can be achieved for this combination of questions.

The least critical value would result from a respondent who assesses the quality as very good and for whom the quality is at the same time very unimportant. Calculation of the extreme value: (a-b) = (1-6) = -5

This means “-5” is the least critical value that can be achieved for this combination of questions.

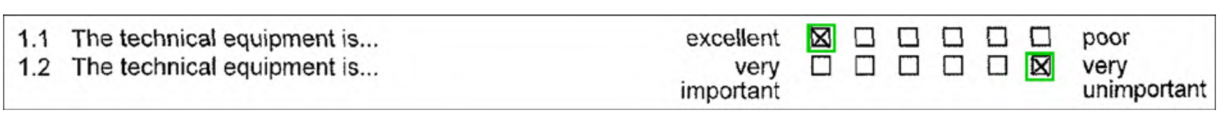


Figure 700: *Example of a Dual Scale Question (2)*

In the above examples the critical values are between 0 and +5 as the positive pole (as indicated by the pole labels “excellent” and “very important”) is on the left-hand side of the scale. In contrast, if it was on the right-hand side, the values between 0 and -5 were to be interpreted as critical.

The reason for this is that, although the poles of the scaled questions can be chosen freely, the order of the answering options cannot: The boxes in evasys are counted through from left to right and the value of the difference stays the same, independent of which pole is on which side of the scale.

The results of the dual scale questions in the PDF report can be displayed as so-called **dual scale profile lines**. In the menu “System Settings/Report Settings/Configuration/Dual Scale Profile Line” has to be defined beforehand if the critical values are found on the right or left side of the scale.

According to this setting, the region of the critical values is shaded red in the PDF report.

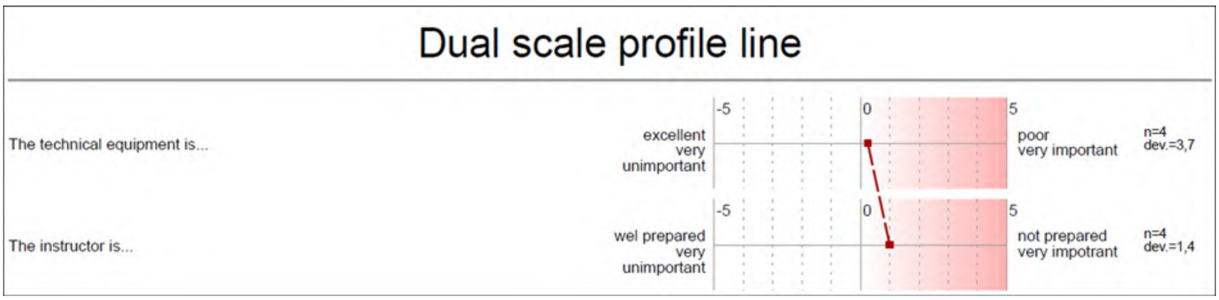


Figure 701: Dual Scale Profile Line in the PDF Report

Note:
Only scaled questions with the same number of answer options (e.g., 6-point scale) and with the positive and negative poles at the same side (e.g. always left pole = positive pole) can be combined for a dual scale question.

5.2. Target-performance comparison

In case of the target-performance dual scale the results of the combined questions are displayed in a radar chart in the PDF report. The mean values of the two combined questions are presented in a direct comparison so that deviations can be easily recognized. There is no special type of calculation, just a graphical representation of the results.

This type of dual scale can be used to display the divergences between the expectations regarding defined quality aspects. As the analysis is done by means of a radar chart, at least three dual scale questions (six scaled questions) have to be used. The more questions are contained in a group, the larger the radar chart gets.

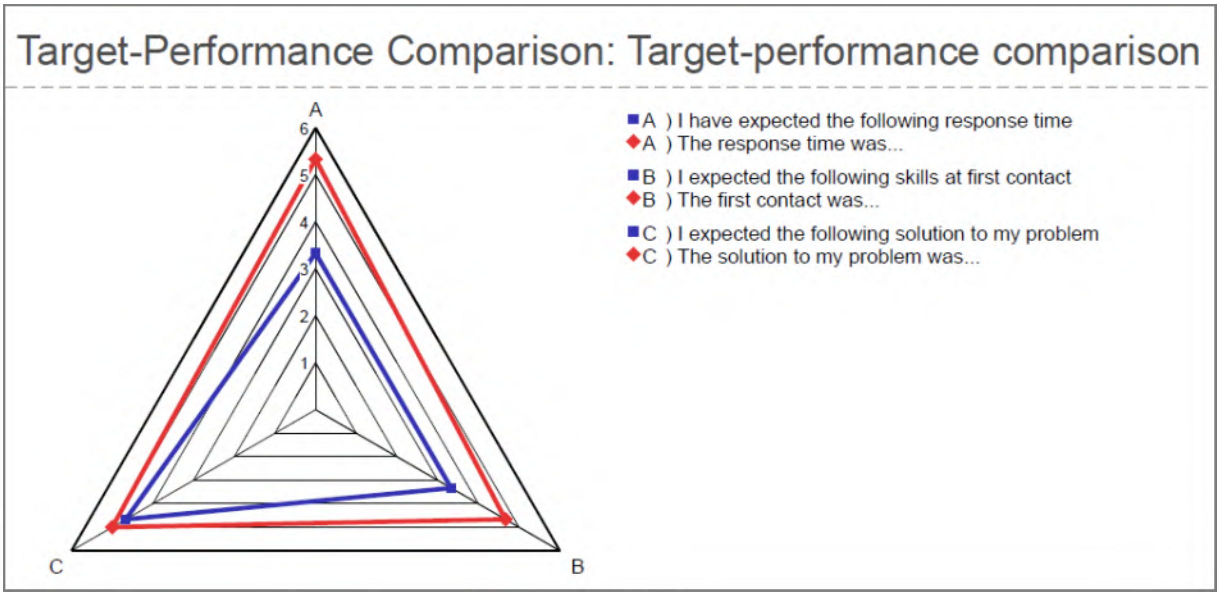


Figure 702: Analysis of target-performance dual scale in a radar chart

Please note, that the highest amplitude of the diagram equals the highest possible answer option. If your question group contains scaled questions with a different scale (e.g. 4-point and 6-point scales) or a different polarity, this has be taken into consideration when interpreting the diagram. We recommend using a consistent scale.

5.3. Learning Outcome

For this type of dual scale question the results of the outcome-based evaluation are calculated and displayed in a special graphical representation according to Raupach et. al. Med Teach 2011:e446-ee453.

Learning outcome within a student cohort is reflected by the change in mean values between the two data collection points. However, as more advanced students most probably know more than their less advanced peers, their initial self-ratings will be more favorable, thus reducing the scope for absolute numerical change on a six-point scale. If left unadjusted, this is likely to result in learning outcome to be underestimated for advanced students compared to novices in whom learning outcome will be overestimated. Adjustment for initial performance levels can be achieved by dividing the difference in mean self-ratings by mean ratings obtained before exposure to the module/course (‘pre-ratings’). As students progress, these pre-ratings will improve (i.e. numerical values will decrease owing to the fact that 1 is the most favorable option), and any absolute pre-post change will be divided by a smaller value. At the same time, novice students are more likely to provide less favorable pre-ratings so that any absolute pre-post change will be attenuated by dividing it by the pre-rating (which is numerically higher). Student learning outcome is calculated using the following formula:

$$\text{CSA gain [\%]} = \frac{\mu_{pre} - \mu_{post}}{\mu_{pre} - 1} \times 100$$

Formula 1: CSA = comparative self-assessment; μpre = mean student self-ratings before exposure to teaching; μpost = mean student self-ratings after exposure to teaching; the correction term '-1' in the denominator reflects the fact that the six-point scale is anchored by 1 and not 0.

This formula produces values between -100% and +100%. A CSA gain of 100% requires all students to tick the most favorable scale option at the end of the module/ course. The following table illustrates how adjusting for initial performance levels impacts on CSA gain values.

Pre-rating	Post-rating	Absolute difference	Adjusted pre-rating	CSA gain
5	3	2	4	2/4 = 50%
4	2.5	1.5	3	1.5/3 = 50%
2	1.5	0.5	1	0.5/1 = 50%
3	1	2	2	2/2 = 100%

Table 24: Example of Calculations

If students provide less favorable self-ratings after a module than at the beginning of a module, learning outcome will be negative. This is likely to occur if students were confused by the way content was presented or if self-rating statements were unrelated to what has actually been taught in a module (both of which would be significant findings for teaching co-ordinators). If the numerator of the above formula is <0, dividing this difference by the adjusted pre-rating produces disproportionally low CSA gain values. For this reason, evasys automatically uses a separate formula in the case of negative pre-post differences:

$$\text{CSA gain [\%]} = \frac{\mu_{pre} - \mu_{post}}{6 - \mu_{pre}} \times 100$$

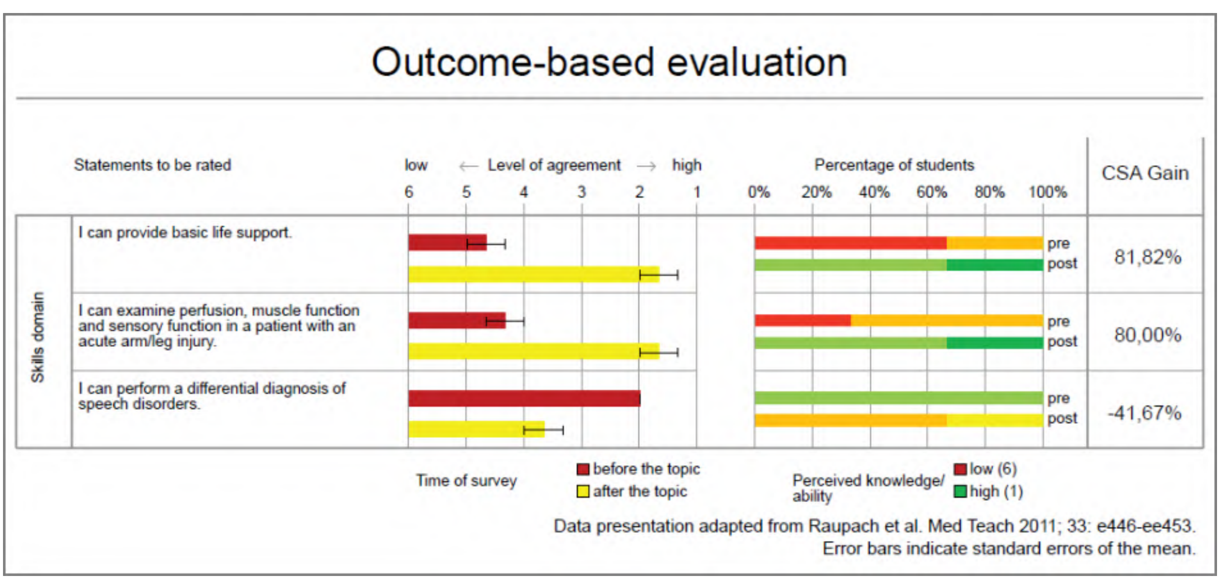


Figure 703: Learning Outcome

6. Cumulative Frequency

The cumulative frequency sums up the frequency of defined answers of scaled questions and single choice questions. In the Data Export Configuration you can define which options are to be cumulated. This function can be used to visualize how many answers have exceeded or deceeded a defined value (e.g. how many participants have select an option higher than 4).

The cumulative frequency is shown as a relative value next to the graph of scaled and single choice questions.

Figure 704: Cumulative frequency in the PDF report

7. Ranking Question

Calculation:

$$x = \frac{X_1 w_1 + x2_2 w_2 + x_3 w_3 \ldots x_n w_n}{Total}$$

w = weigth of the ranked position
x = numbers of mentions of the answer option

Figure 705: Ranking Question Calculation

The weightings are applied in reverse order. The answer most frequently set to the first place by the participants will receive the highest weighting, the answer least frequently set to the first position will receive the lowest weighting.

Weighting for a ranking question with 5 answer options:

- The answer set to position 1 receives a weight of 5
- The answer set to position 2 receives a weight of 4
- The answer set to position 3 receives a weight of 3
- The answer set to position 4 receives a weight of 2
- The answer set to position 5 receives a weight of 1

Example for a survey with 10 participants for an answer with the result 4,2:

$$\frac{0*1 + 1*2 + 1*3 + 3*4 + 5*5}{10} = 4{,}2$$

Figure 706: Ranking Question Example

8. Norming

In evasys, you can add norm values for questionnaires. Thus, you can more easily compare and interpret results from surveys which are based on this questionnaire. There are two methods of creating norms: You can create standard scores or create percentile ranks.

8.1. Standard Scores

The norming in evasys was developed in cooperation with Dr. Heiner Rindermann from Magdeburg University and consists of a modified form of the Z-transformation.

The formula for cases where large (above average) values are better is:

$$\text{Normed value} = \left(\frac{\text{mean - norm basis mean}}{\text{standard deviation}} * 10 \right) + 100$$

When lower (below average) values are better the formula is as follows:

$$\text{Normed value} = 100 - \left(\frac{\text{mean - norm basis mean}}{\text{norm basis standard deviation}} * 10 \right)$$

Example Calculation when Higher Values Are Better:

Suppose the indicator – i.e. the overall mean – of a question group in a questionnaire is 5.9 and the corresponding value of the indicator for the norm basis is 5.388. Further, suppose the standard deviation of the norm basis is 0.9344. The norm value is then given by the following calculation:

$$\text{Normed value} = \left(\frac{5.9 - 5.388}{0.9344} * 10 \right) + 100$$

$$\text{Normed value} = 105.5$$

Hint:
If the setting “Mode of calculation for norming” is set on “Mean value of the mean values of the data sets” in the configuration of the PDF report, the indicator calculated for the norming can differ marginally from the standard indicator. In this case, the mean value is calculated by averaging the mean values that have been computed for the individual questions. For this procedure it is necessary that a minimum number of items/questions were answered in the dataset.

The norm values can be interpreted according to the following table. For example, a value of 105.5 can be considered as “slightly above average” (compare line 6):

Norm value (Z)	Percentile rank	Distribution	verbal description
<70	0-0.12	ca. 0.1%	Far below average
70-84.9	0.13-6.67	ca. 6.6%	below average
85-94.9	6.68-30.84	ca. 24.2%	Slightly below average
95-105	30.85-69.15	ca. 38.3%	Average
therein: 100	50	Mean	Mean
105.1-115	69.16-93.32	ca. 24.2%	Slightly above average
115.1-130	93.33-99.87	ca. 6.6%	above average
>130	99.88-100	ca. 0.1%	Far above average

Table 25: Classification of Norms (Mean = 100, Standard Deviation = 10)

Note:
When a norm value basis exists for your questionnaire, you can use this in order to create quality guidelines automatically. Please consult section 8.1.4 “Quality guidelines converted from norms”

8.2. Percentile Ranks

To calculate the percentile rank (between 1 and 100) the maximum raw value (number of options -1) is divided into steps of 0.05 length.

Example:

We consider an indicator with a scale of 1-5. This scale is divided into 0.05 steps. If an indicator has a raw value (average) of 2.74, this value is reduced by 1 and divided by the step width (0.05):

(2.74-1) / 0.05 = 34.8.

$$PRN_i = \frac{mw - 1}{0,05}$$

Figure 707: Calculation of the table position for percentile ranks

The value is rounded accordingly and represents the data base field from which the percentile rank is read. If in the table of percentile ranks the field 35 has a value of 70, this value is displayed as the corresponding percentile rank in the report. In this case, 70% of the courses had a lower rank in the comparison data base.

The mean values of the evaluation of a scaled question achieved in the survey are assigned a percentile rank between 1 and 100 with the help of a table. A percentage rank is assigned for each step according to the step width.

The table values can be entered manually in the questionnaire details or imported as a CSV file.

More detailed information about the calculation and meaning of percentile norms can be found in in the "Handout on percentile norms". This handout was created by the University of Osnabrück. The implementation of the percentile norms in evasys is based on the procedure used there for the calculation of percentile norms. The document can be provided by support.

For more information on setting up percentile ranks for a questionnaire, please refer to chapter B 6.1.2. "Percentile rank norming".

9. Quality Guidelines

With quality guidelines you can define minimum standards for questions in a questionnaire that have to be reached by survey responses. Quality guidelines can be created in two ways: As an average-based and as a frequency-based quality guideline. Both types of calculation are explained below.

9.1. Average-Based Quality Guidelines

When calculating average-based quality guidelines, the polarity of the individual questions must be taken into account, i.e. the calculation differs according to whether higher values are better (positive value on the right) or lower values are better (positive value on the left).

Example Calculation, when Higher Values Are Better:

In the following example, a scaled question with a 6-point scale “Please grade the course altogether” was assigned a lower threshold value of 3 and an upper threshold of 4. It was also determined that higher values are better.

Figure 708: Definition of a Quality Guideline

When the question “Please grade the course altogether” reaches a mean of 4.2 in a survey, a green traffic light symbol indicates that the target value (>4) has been reached.

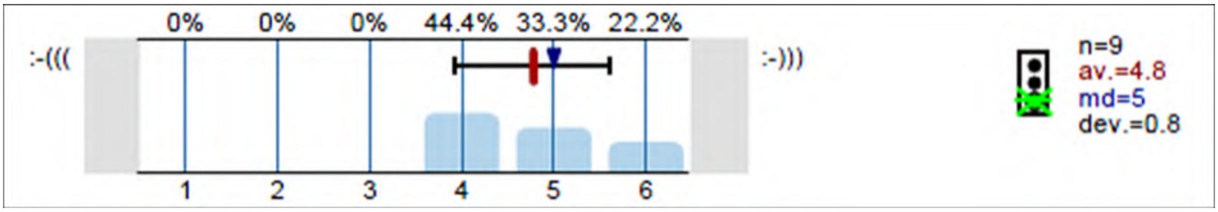


Figure 709: Traffic Light in a PDF Report

The following table shows an example calculation of the quality guidelines (higher values are better):

	Lower Threshold Value	Upper Threshold Value	Weighting
Question 1	3	4	25%
Question 2	2.8	3.7	75%
QG 1			**25%**
Question 3	3	4	50%
Question 4	2.8	3.7	50%
QG 2			**75%**
Result A)	**Mean**	**Quality (absolute)**	**Quality (%)**
Question 1	3.8	0.80	80%
Question 2	3.1	0.33	33%
Q-Index 1			**45%**
Result B)	**Mean**	**Quality (absolute)**	**Quality (%)**
Question 3	4	1.00	100%
Question 4	3	0.22	22%
Q-Index 2			**61%**
Q-overall			**57%**

Table 26: Example Calculation of Quality Guidelines, when Higher Values Are Better

The values in the top half (shaded yellow) are the values from the quality guideline that you set individually when creating the guideline. For each quality guideline, you set the weighting in relation to the overall quality index (QG 1 = 25%).

You can then assign any number of scaled questions to each quality guideline (QG 1 = two questions). For these questions, you also define a lower and upper threshold value, as well as how much this question contributes to the quality guideline in percent (Question 1: lower threshold value = 3; upper threshold value = 4; a proportion of 25% of quality guideline 1).

In the lower half of the table (shaded green) you see the results of your questions. The question 1 for example reached a mean of 3.8.

*The **absolute quality** is calculated according to the following formula:*

(observed mean – lower threshold value)/(upper threshold value – lower threshold value)

In this example for question 1: (3.8-3)/(4-3)= 0.8

*For the **quality in %** the following applies: If the quality is > 1, then 100% is reached. If the absolute quality is <0, then 0% is reached. For all values between 0 and 1, the quality in % = absolute quality * 100.*

*In this example for question 1: 0.8 * 100 = 80%*

*The **quality index of the whole quality guideline** is calculated with the following formula:*

*Σ (observed quality per question in % * weight per question) / 100*

*In the example this is for quality guideline 1: ((80%*25%)+(33%*75%))/ 100=44.75%*

This value is rounded to 45%.

*The following formula is used to calculate the **overall quality of this survey**:*

*Σ (quality index of whole quality guideline * weighting of whole quality guideline in relation to the overall quality index) / 100*

In the example this gives the following calculation:

*((45%*25%)+(61%*75%))/100=57%*

Hence, the survey has reached an overall quality of 57%.

Example Calculation of Quality Guidelines when Lower Values Are Better:

	Lower Threshold Value	**Upper Threshold Value**	**Weighting**
Question 1	3	4	25%
Question 2	2.8	3.7	75%
QG 1			**25%**
Question 3	3	4	50%
Question 4	2.8	3.7	50%
QG 2			**75%**
Result A)	**Mean**	**Quality (absolute)**	**Quality (%)**
Question 1	1.5	2.5	100%
Question 2	4.5	-0.89	0%
Q-Index 1			**25%**
Result B)	**Mean**	**Quality (absolute)**	**Quality (%)**
Question 3	3.5	0.5	50%
Question 4	2	1.89	100%
Q-Index 2			**75%**
Q-overall			**62.5%**

Table 27: Example Calculation of Quality Guidelines when Lower Values are Better

The values in the top half of the table (shaded yellow) are the values of the quality guideline that you set individually when creating the guideline. For each quality guideline you define the weighting in relation to the overall quality index (QG 1 = 25%). Any number of scaled questions can then be assigned to this quality guideline (QG 1 = 2 questions). For each of these questions you define a lower and upper threshold as well as the percentage it counts towards the quality guideline (question 1: lower threshold value = 3, upper threshold value = 4; proportion of quality guideline 1 of this question: 25%).

In the bottom half of the table (shaded green) you can see the results of your questions. Question 1 for example has a mean value of 1.5.

*The **absolute quality** is calculated according to the following formula:*

(upper threshold value – observed mean)/(upper threshold value – lower threshold value)

In this example for question 1: (4-1.5)/(4-3)= 2.5

*For the **quality in %** the following applies: If the absolute quality is > 1, then 100% is reached. If the absolute quality is < 0, this corresponds to 0%. For all values between*

*0 and 1 the quality in % = absolute quality *100.*

In this example for question 1: 2.5 > 1 = 100%

In order to calculate the ***quality index for the whole quality guideline****, use the following formula:*

*Σ (observed quality per question in % * weighting per question) / 100*

*In this example for quality guideline 1: ((100%*25%)+(0%*75%))/100 = 25%*

The ***overall quality of the survey*** *is calculated using the following formula:*

*Σ (quality index of whole quality guideline * weighting of whole quality guideline in relation to the overall quality index)/100*

In the example the calculation is thus:

*((25%*25%)+(75%*75%))/100 = 62.5%*

The survey thus reached an overall quality of 62.5%.

Hint:

If in the questionnaire you have defined questions where the best/worst evaluation result can be found exactly in the middle (= “level questions”), you can choose them twice when defining a quality guideline.

A possible level question is “Do you think the number of presentations was adequate?“. In answer to this, the interviewees can select one of seven possible options connected with the ratings “too few” – “just perfect” – “too many”. The positive judgments lie in the middle (when the interviewees choose “just perfect”, respectively the value of 4). To integrate these questions into the quality guideline in a meaningful way, first choose a question and define the first side of the scale to be negative (“left of the middle”). For evaluation results below a certain threshold (e.g. 2.5), you have to make a quality deduction. As normal, you have to define a range of tolerance here (e.g. 2.0 to 2.5).

For the other side of the scale (“right of the middle”) you have to choose the question once again. Now you can say that results bigger than the upper threshold will also cause a deduction of quality (e.g. the upper threshold may be 6 – again with a chosen range of tolerance).

In this way you ensure the level questions are interpreted in a meaningful way in regard to the quality guideline.

If you integrate level questions into the quality guidelines, the total quality percentage of all scaled questions can exceed 100% (see following figure) because each of the level questions needs to be included twice.

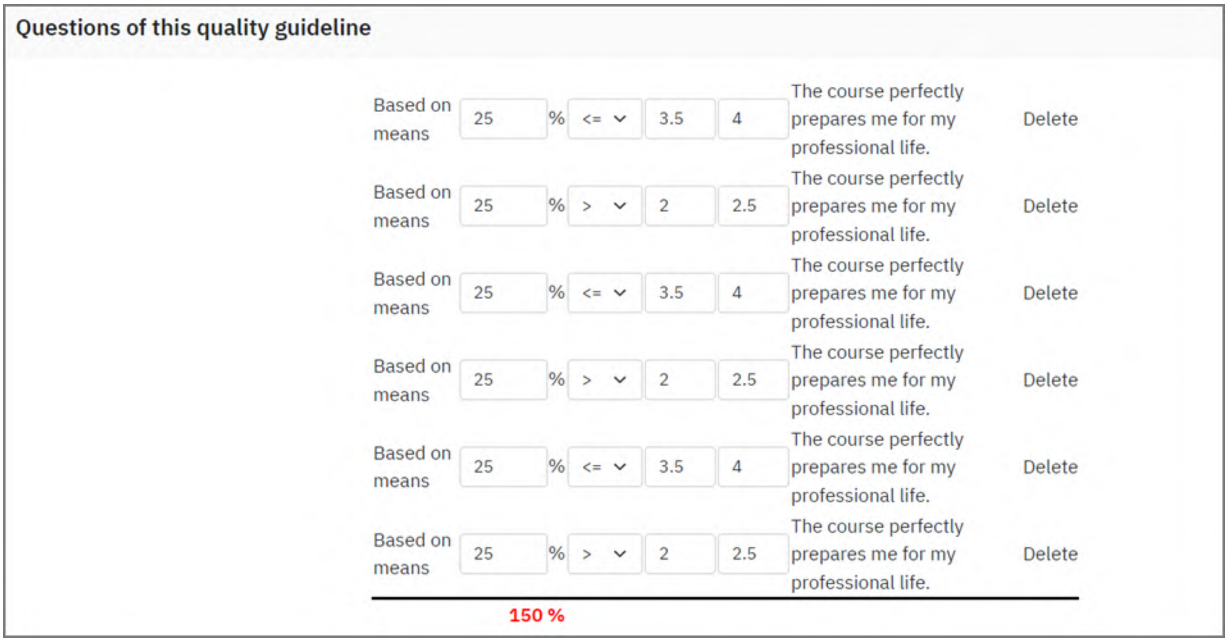


Figure 710: Level Questions

> **Note:**
> After choosing a question once it will be marked by an asterisk (*) in the list. Thus you will be informed that it is already in use in the quality guideline.

9.2. Frequency-Based Quality Guidelines

As an alternative to the averaged-based quality guidelines discussed above you can set so-called frequency-based quality guidelines. In this case, the decisive criterion is not a mean value which is equally influenced by all respondents, but a specified frequency of responses within a particular range of response values. In contrast to the average-based quality guideline, there is no tolerance range and therefore when the targeted value is not reached, the full deduction comes to effect immediately.The polarity of the scaled question is also relevant for the frequency-based quality guideline, i.e. whether high values are better (right pole) or low values are better (left pole).

Example calculation, when higher values are better:

In the following example for the scaled question “The instructor is always well prepared” with 6 response options it was defined that at least 36% of respondents must have chosen response options 5 or 6. At the same time it was set that high values are better.

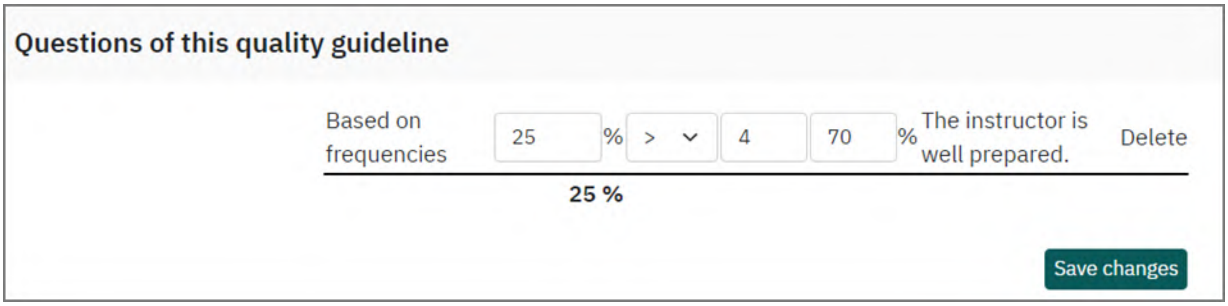


Figure 711: Frequency-Based Quality Guideline

> **Note:**
> Only whole numbers can be entered as percent figures. Decimal numbers are not supported.

In the following figure 37.6% (31.3% + 6.3%) have ticked the values 5 or 6 in response to the question "The instructor is always well prepared". Therefore, a green traffic light symbol in the PDF report indicates that the target value was met.

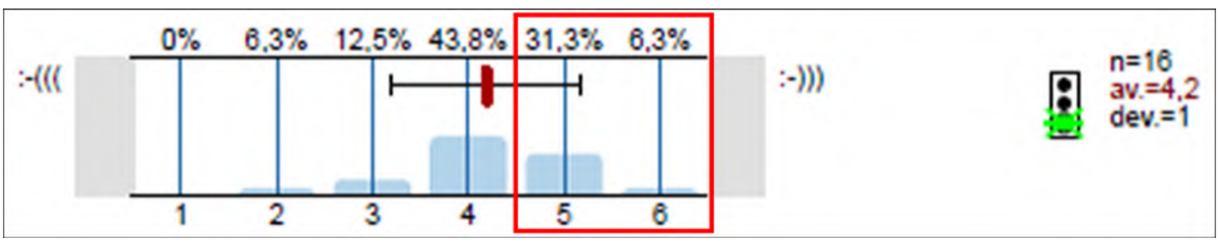


Figure 712: Frequency-Based Quality Guideline – Traffic Light

9.3. Quality Guidelines Converted from Indicators

If you have defined indicators for your questionnaire already you can use these in order to save work when defining quality guidelines. Evasys can convert question groups for which you have set indicators automatically into quality guidelines; it allocates the questions corresponding to the question group to the respective quality guideline. Like this, the structure of a questionnaire with its question groups and questions belonging to them can be directly adopted for the quality guidelines.

Figure 713: Converting a Quality Guideline from Indicators

On the top left the relevant lower and upper threshold values for the quality guidelines are set for all scaled questions in terms of percentage values. In addition you can declare a global default setting regarding the orientation of the scales (whether higher values are better or lower values are better).

Underneath you find the question groups with all scaled questions that belong to them. On the right-hand side you find for each scaled question a drop-down menu as well as the lower and upper threshold values.

The orientation of the scales is particularly important: Here, this can be defined individually, so that you can change poles for individual questions if necessary. The threshold values for the range of tolerance depend on the length of your scale (2 to 11 options); exact target values can be defined later. In order to refresh the view after editing values click on [Reload]. The following examples illustrate some threshold values for different scales:

Type of Scale	Lower Threshold 40%	Upper Threshold 60%	Poling	Resulting Quality Guideline
4-point scale	2.2	2.8	Higher values are better	> (2.2 – 2.8)
5-point scale	2.6	3.4	Higher values are better	> (2.6 – 3.4)
6-point scale	3	4	Higher values are better	> (3 – 4)
7-point scale	3.4	4.6	Higher values are better	> (3.4 – 4.6)
4-point scale	2.2	2.8	Lower values are better	< (2.2 – 2.8)
5-point scale	2.6	3.4	Lower values are better	< (2.6 – 3.4)
6-point scale	3	4	Lower values are better	< (3 – 4)
7-point scale	3.4	4.6	Lower values are better	< (3.4 – 4.6)

Table 28: Threshold Values

Example:

Calculation of a tolerance range for: lower threshold = 40%; upper threshold = 60%.

e. g. 4-point scale: Distance of three whole units between 1 and 4

Lower threshold:

*40% (=0.4) of the three units: 3 * 0.4 = 1.2*

Add the value of 1.2 to the starting value of the scale (= 1, as there has to be ticked at least the value “1”): equals 2.2

Upper threshold:

*60% (=0.6) of the three units: 3 * 0.6 = 1.8*

Add the value of 1.8 to the starting value of the scale (=1): equals 2.8

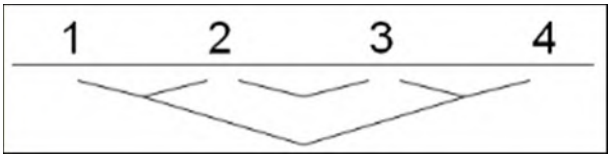


Figure 714: Three whole Units, Beginning at "1"

Type of Scale	Lower Threshold 40%	Upper Threshold 60%	Poling	Resulting Quality Guideline
4-point scale	2.2	2.8	Higher values are better	> (2.2 – 2.8)

Table 29: Threshold Values – Example of a 4-Point Scale

9.4. Quality Guidelines Converted from Norms

When defining quality guidelines, it is often difficult to decide where to set thresholds for good and poor quality. A natural approach is therefore to set these thresholds on the basis of results that you have collected with this questionnaire in past surveys. The function "Convert quality guidelines from norms" has been created to make this process simpler.

Statistical Approach

The direct basis of the quality guidelines are the norm values (i.e. mean and standard deviation of the norm base) of the individual questions. The strength of this approach is that the norm values are based on a very large data basis and the poling of the questions is already set.

The idea of the conversion is to tie the lower and upper thresholds of the quality guideline to the means and standard deviations of the norm base. Whether the threshold value corresponds exactly to the mean of the norm base or is slightly better or worse can be defined by the user by choosing a "multiple" of the standard deviation of the norm base (S).

This multiple is called granularity. The granularity can be between +3 and -3, so that you can define whether the threshold of the quality guideline is to be below or above the mean of the norm base. The granularity is chosen once for the lower and once for the upper threshold for all questions together.

The calculation of the threshold values for the quality guidelines is done automatically after the conversion.

Example Calculation, when Higher Values Are Better:

For a questionnaire where higher values are better, the granularity set for the negative threshold affects the calculation of the lower threshold value (= negative threshold value).

***Note**: In a question where higher values are better, the negative thresholds are always the lower thresholds.*

Accordingly, the granularity of the positive threshold influences the upper threshold value.

The following formula is used for this:

*Lower threshold value = norm base mean value (avg.) – granularity of the negative threshold * norm base standard deviation*

Hence, for the example pictured below the calculation is as follows:

*lower threshold value = 5 - 1 * 1.03 = 3.97*

Figure 715: Example Calculation, when Higher Values Are Better

Example calculation, when Lower Values Are Better:

For a questionnaire where lower values are better, the granularity set for the negative threshold (= negative threshold value) affects the calculation of the upper threshold value (= negative threshold value).

***Note**: In a question where lower values are better, the negative thresholds are always the upper thresholds.*

Accordingly, the granularity of the positive threshold influences the lower threshold value.

The following formula is used for this:

*Upper threshold value = norm base mean value (avg.) + granularity of the negative threshold * norm base standard deviation*

Hence, for the example below the calculation is as follows:

*upper threshold value = 5 + 1 * 1.03 = 6.03*

Figure 716: Example Calculation, when Lower Values Are Better

D. System Settings and Management

- Configuration Settings
- Support

1. System Management and Summary

- Search
- Writing Email
- Delivery
- Utilization Statistics
- Evaluation Statistics
- System Information
- License Administration
- Scanstation Setup
- Deletion Log
- System Cleaning

1.1. Search

With the search function you can search for users, courses, surveys as well as deliveries either individually or in combination.

The search function can be found on all menu pages in the upper right hand corner. Enter your search term and click on [Search]. All four categories are searched and you are directed straight to the search result pages.

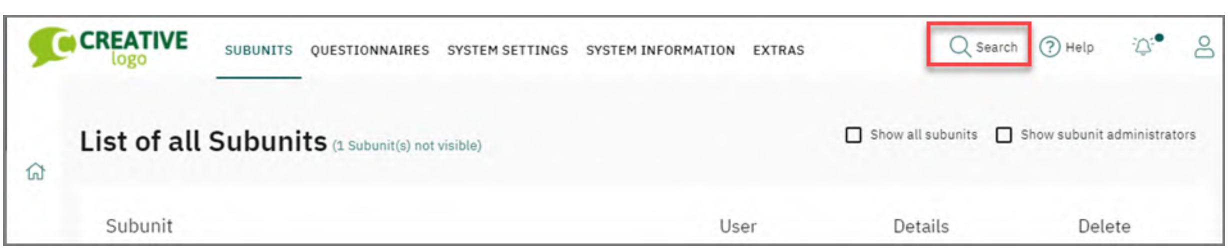


Figure 717: Search Function

You can find the same results by opening the evasys searchmask at “System Information/Search” and making no restrictions in “Search In”.

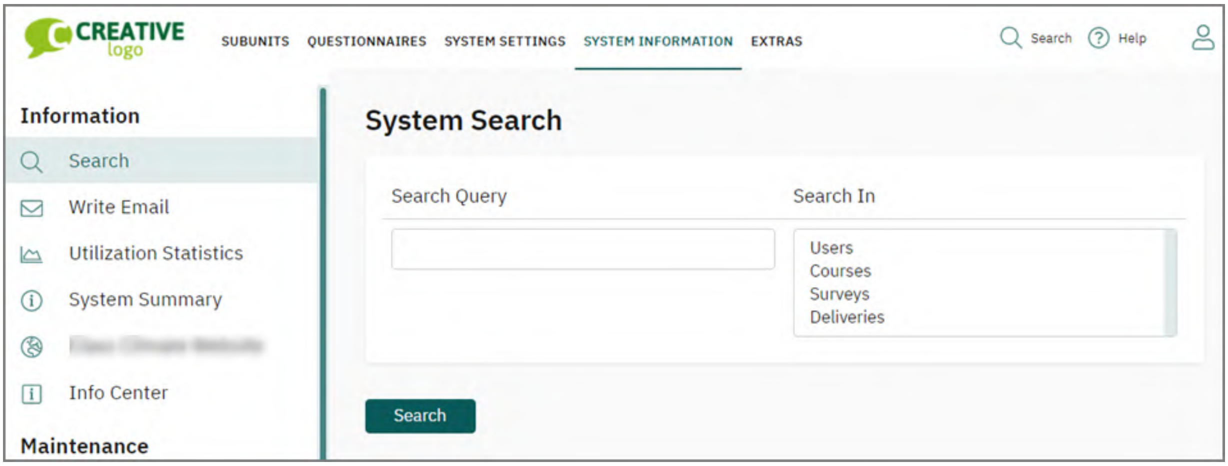


Figure 718: Searchmask

For the search text you may use the following operators:

Without operator: “day”

Entering “day” as a search term leads you to day, Monday, Daytona, daylight. Wildcard characters are automatically placed before and after the search term.

The same as the search term: “=day” or “+day”

The search term “=day” will just return day. Alternatively you can use “+day”. In contrast to “=day”, “+day” can be expanded by an asterisk, that is “+day*”, which also returns the term Daytona.

Exclude a term:“day –Monday“

Returns day, Tuesday, Daytona, etc.. but not Monday.

Greater than:“>10”

Returns number entries that are greater than 10.

Smaller than:“>10”

Returns number entries that are smaller than 10.

You can combine more than one search term, e.g. “day + Henry –Maria” searches for text passages in which the terms “day” and “Henry” but not “Maria” are found.

1.1.1. Searching for Users

Searches for users are conducted in the profile fields, title, first name, last name, user name and email.

Example:

You are searching for users who have the word “William” in their profile data.

Enter “William” as a search term and highlight “user” as search goal. Then click on [Search].

Figure 719: Searching for Users

You will then see under the search template the area for search results. In “hits” you see that two users were found.

Click on [Details] to display the search returns.

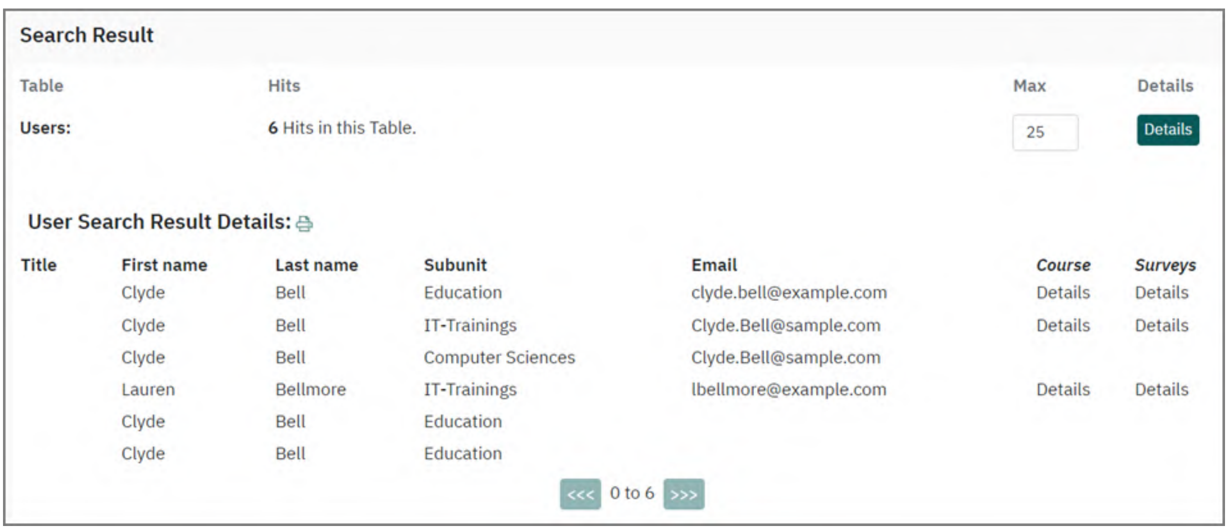


Figure 720: Search Result Details

The results can be sorted in ascending or descending order by clicking on the column name. The data fields are themselves the references:

- Last name: Refers to the user profile
- Subunit: Refers to the subunit window
- Email: Initiates an email to the relevant user
- Surveys: Opens the surveys of the user

1.1.2. Search for Courses

With this search you can find details about existing courses.

Figure 721: Search for courses

In the example a search has been made for the term “mathematics*”.

The columns of the results table can also be sorted in ascending or descending order. By clicking on a course you will be taken directly to the course details.

Searches are carried out in the databases program of study, course name, location, type and ID.

The following data fields are displayed

- Name: Name of the course, at the same time a reference to the course data
- Program of study
- ID
- Type

1.1.3. Search for Surveys

This search allows you to find surveys. The search takes place in the survey data fields creation data, processing date, survey name, survey ID and number of returns.

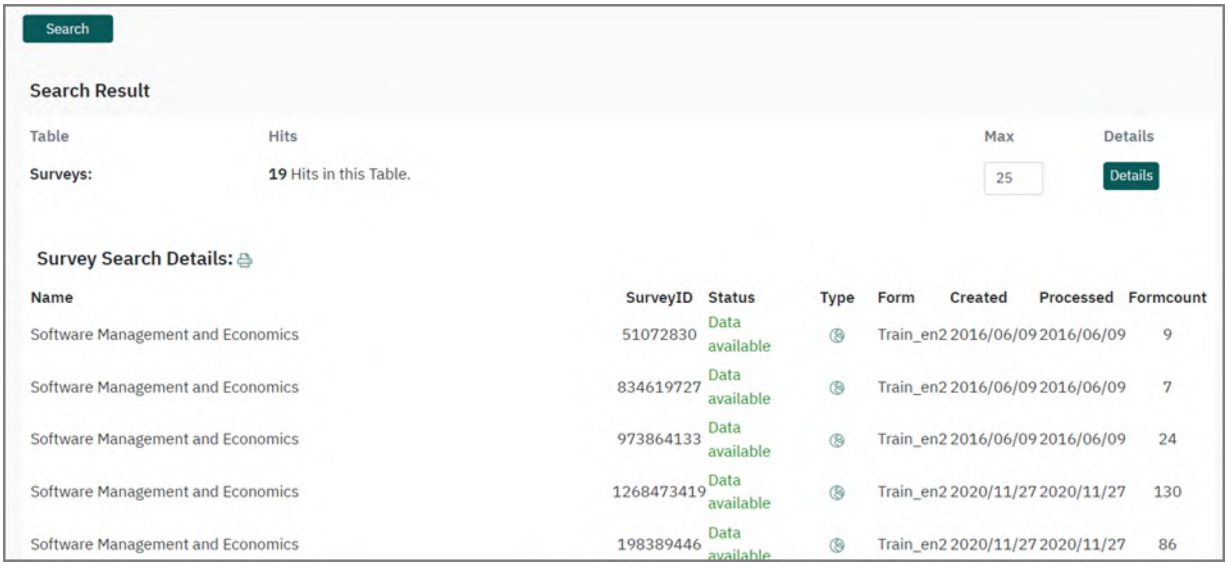


Figure 722: Search for surveys

Displayed are:

- **Survey name:** at the same time a reference to the survey folder
- **SurveyID:** this number is identical to the operation number on the questionnaire without the check digit
- **Status:** ready, data existing, validation or deleted
- **Type:** Paper or online survey
- **Form:** short name of the questionnaire
- **Creation:** date the survey was created
- **Processed:** date of the (last) time this survey was carried out
- Number returns (form count): number of scanned questionnaires (empty questionnaires are counted)

1.1.4. Search for Deliveries

The content of the search table for deliveries is identical to the delivery table in the menu "System Information/Deliveries" (see Section 5.6.7). The search is conducted in the fields survey ID, target address, date as well as first and last name of the recipient.

The table contains the following information:

- **Batch:** Batch ID of jobs which contains the questionnaires processed for this survey.
- **Survey:** Name of the survey, the questionnaire module (i.e. of the questionnaire) as well as the course type.

- **Recipient:** The recipient is also the owner of the instructor account.
- **Target address:** Target email addresses or internal email addresses the reports have been sent to.
- **Method:** Delivery method either email (letter symbol) or internal email (paper symbol)
- **Sent:** Tells whether the report has been sent or printed
- **Delivery date:** Date of the email delivery or the internal email print download.

1.2. Writing Email

This function gives you the possibility to send a message to all evasys users.

By selecting all users (press the left-hand button on the mouse and pull to the bottom of the list) you can send an email to all users. As soon as two or more recipients are selected, evasys sends the email via the BCC field (blind copy) so that the addresses of the recipients cannot be seen. Please remember that creating hundreds of emails could take, depending on the email server load, several minutes.

Enter a subject line as well as a message and then click on “OK” to send the email. You can see if this action was successful in the display line at the top of the browser window.

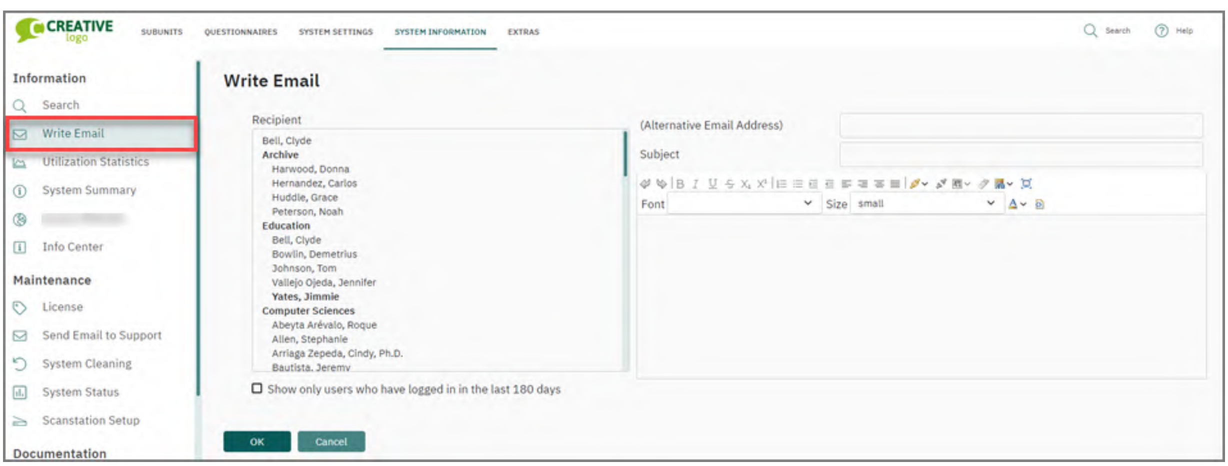


Figure 723: Writing an email to users

The sender address and the sender name are taken from data in the user profile of the administrator.

Other email types, some of which are created automatically, receive sender data from “evasys Settings/Email Functions & Accounts/Sender Name for all System Emails”.

With the help of the checkbox “Show only active users” below the recipient list you can hide users which have not logged into the system within the last 180 days. This can be useful if, for example, you want to inform the active evasys users about scheduled maintenance times.

Figure 724: Show only active users

1.3. Delivery

Here you will find a table with a list of all report emails that have been sent.

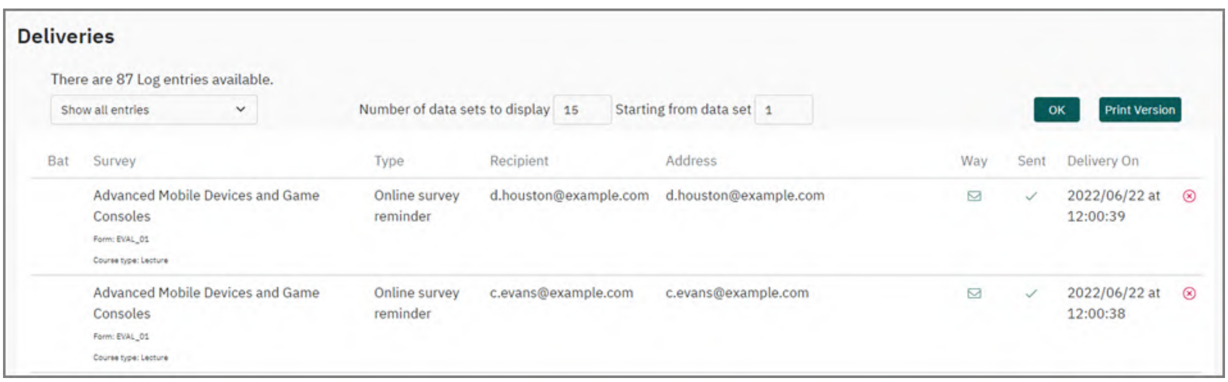


Figure 725: Delivery details

You will find the following information in the table:

Bat: Batch ID of jobs which contain the questionnaires processed for this survey.

Survey: The name of the survey, the questionnaire module (i.e. the questionnaire) as well as the course type. The survey name is also a link which provides access to the surveys of the relevant instructor account.

Type: Enter the content of the delivery, e.g. “default report”, “activate template” or “cover sheet”.

Recipient: The recipient is also the owner of a instructor account. In addition the name of the subunit is given in which the instructor account is located. The instructor name is also a link which provides access to his or her user profile.

Address: The target email address or the internal email address to which the report will be sent. When the internal email address is used (only in the self registering procedure), then reports that are ready for delivery must be accessed through the internal email printing account.

Method: Symbolizes the method of transmission. This is either email (letter symbol) or internal email (paper symbol).

Sent: Tells whether the report has been sent or printed.(green checkmark). A blue “I” means that the report has neither been sent nor downloaded.

Delivery on: Date of the email delivery or internal email printing download.

With the red X symbol you can delete individual entries.

The settings in the head of the table allow you to refine your search queries.

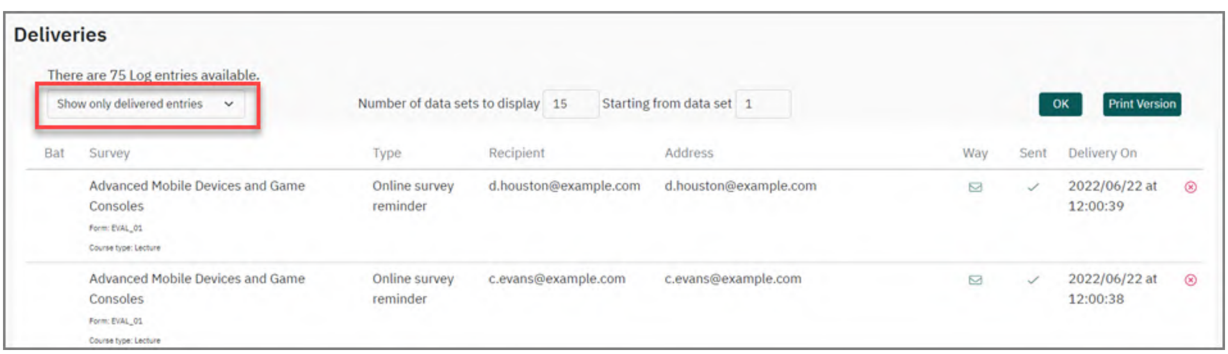


Figure 726: Search Query under “Delivery”

With the button [Print Version] a printer friendly version will be displayed.

1.4. Utilization Statistics

In the section utilization statistics (in the Menu System Information) you will receive an overview about the utilization behavior of evasys users.

At the top of the screen you will see two graphics. At the left is the top 20 instructors according to the number of surveys.

At the right you will see the top 20 in relation to the number of logins. This number is of course interesting only in connection with the decentral model. Complete access is only allowed the administrator and the deans. Normal user accounts can only see the data of those users who in their configuration have permitted this.

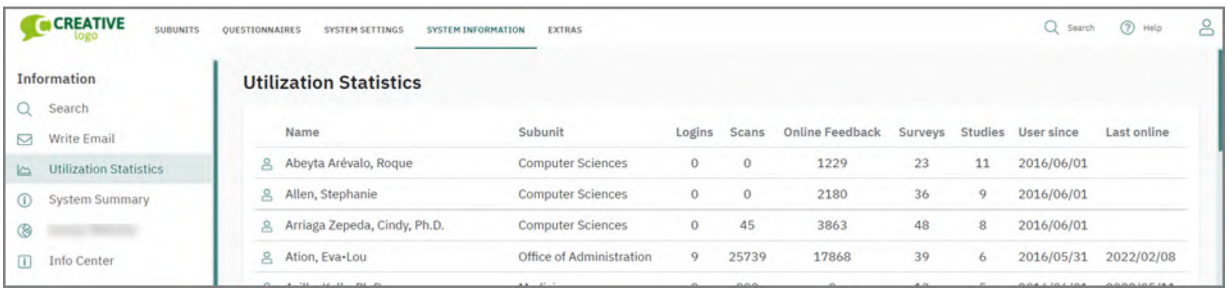


Figure 727: Utilization Statistics

The following data fields are found in the table:

- **Name:** Title, first and last name of the user Subunit
- **Subunit:** Name of the subunit in which the user profile is located
- **Logins:** Number of logins since the user account was created Scans
- **Scans:** Number of scanned paper survey questionnaires. The number of questionnaire sets, not the number of pages, are counted
- **Online Feedback:** Number of completed online questionnaires, both the HTML and the PDF based online surveys
- **Surveys:** Number of surveys which are in the user account at a given time.
- **Studies:** Number of folders the owner has
- **User since:** Date the account was set up
- **Last online:** Date of the last login

1.5. Evaluation Statistics

You can find the evaluation statistics in the details of a paper survey where you have scanned in data:

Figure 728: Survey evaluation statistics

Therein, the header data of all scanned batches from a survey are displayed in a table. This data allows you to see the time and size of the scanning operation.

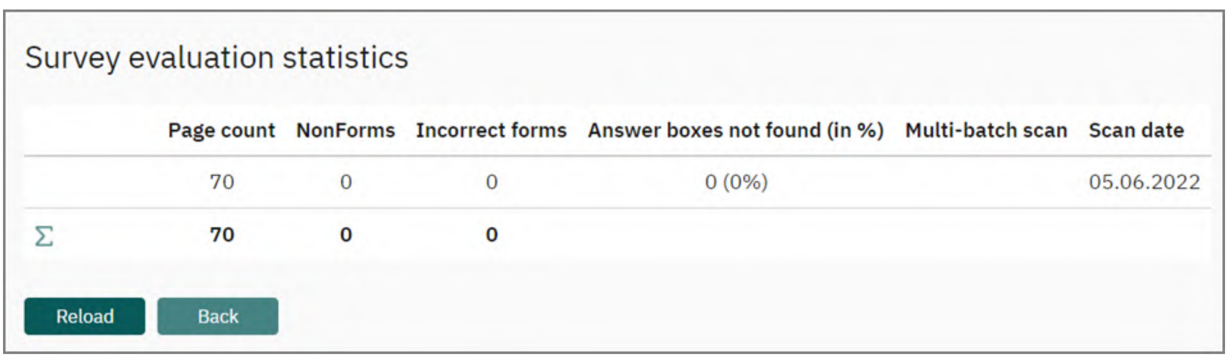


Figure 729: Details of Survey Evaluation Statistics

The specifications:

- Name of **Scanstation** which captured the batch.
- **Number of Pages** of the batch. For Duplex scanners 1 sheet = 2 pages
- Number of non-recognized pages = **NonForms**, these can also be empty pages
- Number of **False Forms**, forms that recognized as evasys forms but did not belong to the scanned survey.
- Number of **check boxes which could not be found**, that is, the number of sections to be read which could not be located by the VividForms Reader (OMR errors).
- Marking whether the batch was part of a **Multi-batch** (only with VividForms forms)
- **Scan Date** of the batch

1.6. System Information

This is where you will receive an overview of the number of surveys in the system as well as in the all subunits. Click “System Information/System Summary”.

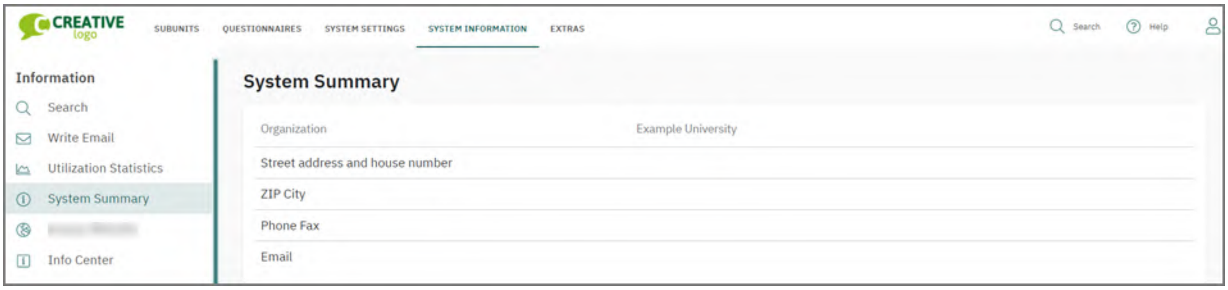


Figure 730: System Information

At first a summary list of surveys with the following states will display:

- **Ready:** Active surveys, for which no results data have yet been registered.
- **Analyzed:** Active surveys, for which returns have already been registered.
- **Data Entry:** Active surveys, for which returns have been registered, however for which the anonymization of handwritten comments has not yet been carried out. This is only an option when the anonymization in the subunit properties has been activated.

You can now choose (multiple selection) course type, survey period and form. Click on [Apply].

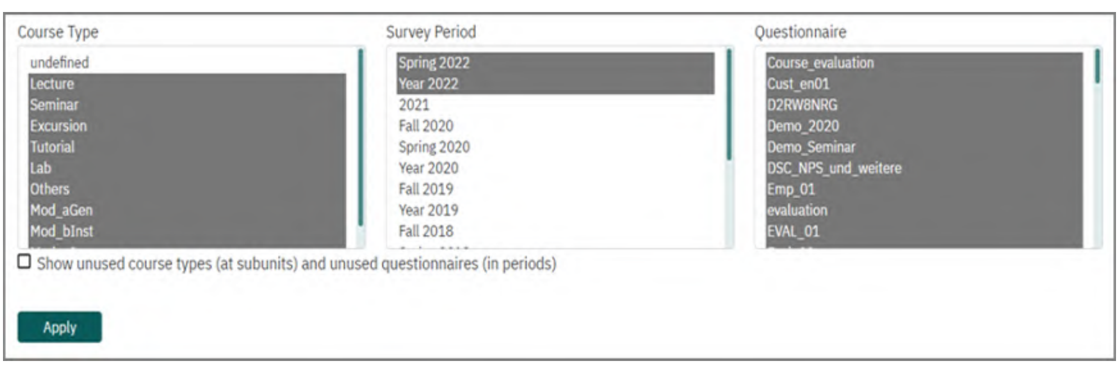


Figure 731: Filter for System Information

Then tables display for each of the individual subunits, which show a list of all the surveys and form return numbers for the selected parameters.

1.7. License Administration

(not Cloud Standard)

- Overview on the License Administration
- Licensable Elements
- Electronic Activation

- Administration of User Accounts
- How to Use a Volume License

1.7.1. Overview on the License Administration

The license administration gives you an overview of the properties of your evasys license. Here you can see information about the product version, the database and about the activation of the paper and online surveys. In case you have licensed the handwriting recognition, open questions of VividForms questionnaires can be processed automatically.

In addition you can see the number of available scanstation and user licenses and, if you have the corresponding licenses, the administration of VividForms Designer licenses.

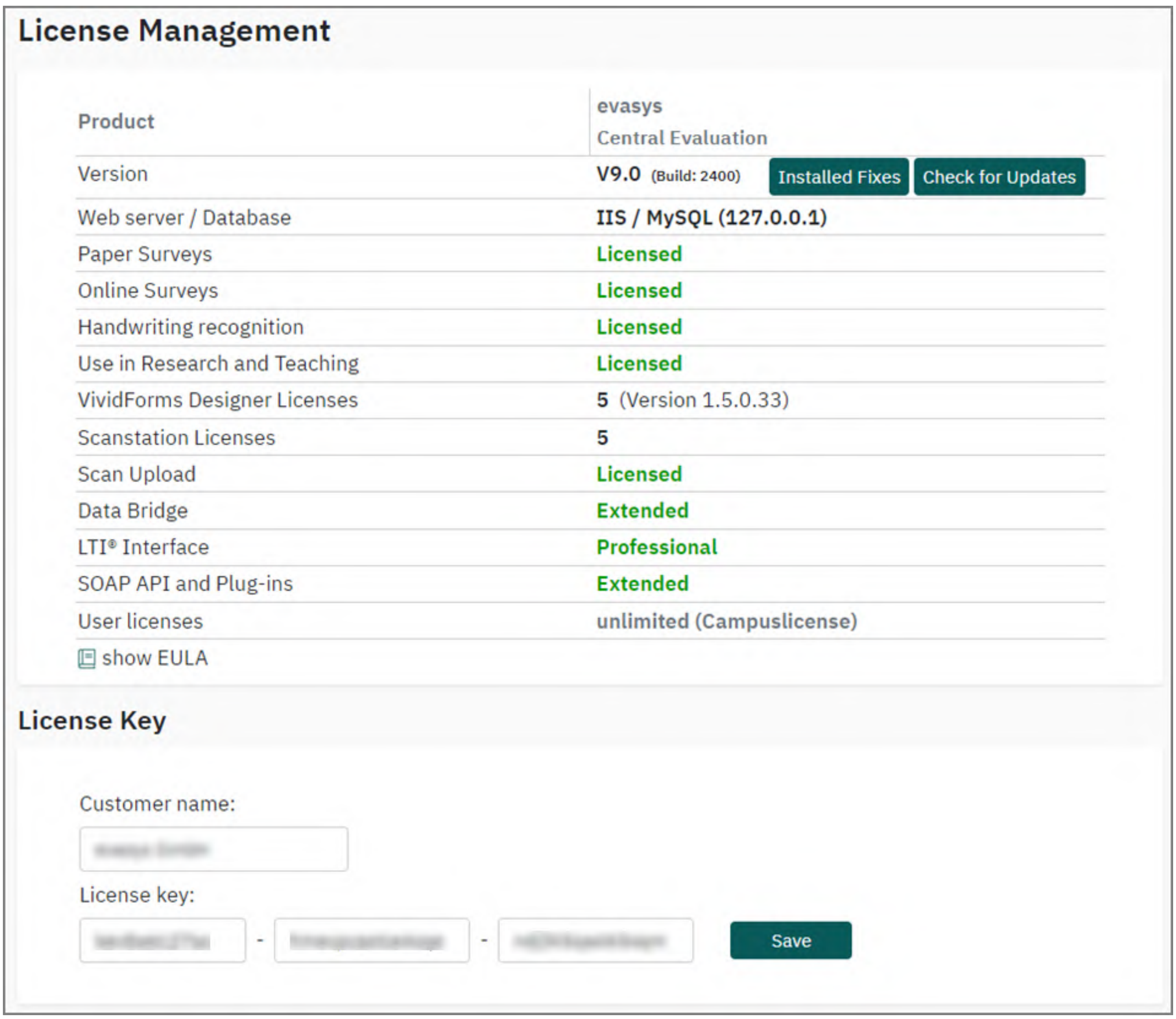


Figure 732: License Management

If your system is a multiple server installation, an overview of the registered servers will be displayed stating the network address and the type of server (back-end server, online survey server). Should you have professional services extensions such as, for instance, a specially programmed data export, these extensions will be displayed in a separate overview.

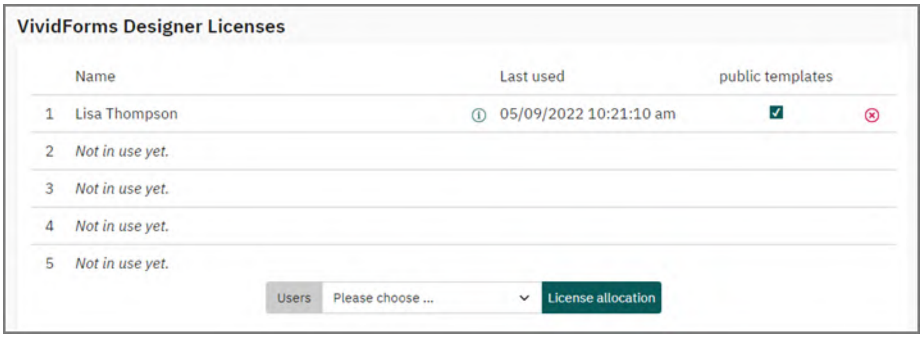


Figure 733: License Management - VividForms Designer

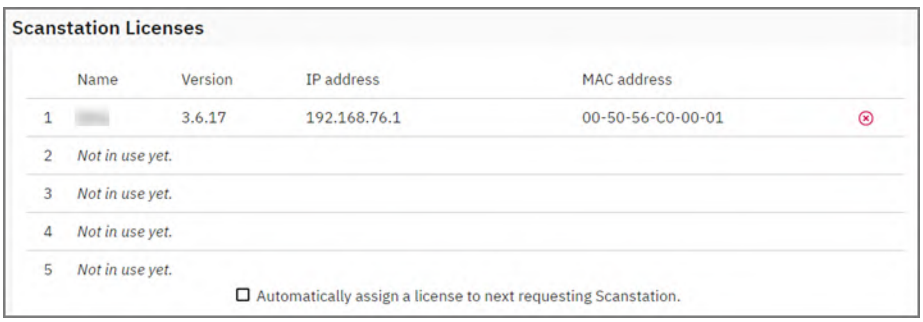


Figure 734: License Management - Scanstation

In the license management the license key, which has been entered during installation, is saved. In case of a system extension by users or software add-ons or in case of a change of name you will receive a new license key which contains the old as well as the new scope of services. In this case please overwrite the existing license key and/or copy the new one, to avoid typing errors, and click the button [Save].

Should you have entered an invalid key, the old key will not be lost. Only a new valid license key will overwrite an existing key.

Beneath the section “License Key” you will find the administration of VividForms Designer licenses. It will only be displayed if you have purchased the corresponding licenses. With the help of the drop-down list a license can be assigned to an evasys user (e.g. subunit administrator or instructor). Select the desired user from the list and click the button [License allocation]. The user will then be shown in the overview of VividForms Designer licenses. If necessary, a license can be revoked by clicking the icon with the yellow brush.

In the bottom section of the license management a list of all licensed scanstations (depending on the license and activation, one or more scanstations are listed). As an administrator, you can activate the option “Automatically assign a license to next requesting Scanstation.”. By doing so, the next scanstation to log on to the evasys server is automatically issued a license. Needless to say, automatic activation can only take place as long as a license is available. Once the scanstation is activated, the option is automatically deactivated. This means that as an administrator, you can control the point in time at which a scanstation can automatically activate itself. As a default, this option is deactivated.

1.7.2. Licensable Elements

The standard product evasys can be supplemented by additional licensable elements and functions (add-ons), which can be added as required. If you are interested, please contact your vendor. In the following, the currently available add-ons are listed. If licensed, they are shown in the license management:

Scanstation

The scanstation is used to scan questionnaires for paper-based surveys. It is a desktop application that is installed locally on a designated computer. The evasys suite already includes a scan station license. If you work at multiple locations in your organization, it may be advisable to purchase additional scanstation licenses so that you can scan from multiple computers.

The scanstation allows the direct connection of a document scanner, but also the processing of image files that were previously generated with a suitable multifunction device. It also offers extensive error handling capabilities. For further information on the scanstation see chapter B 4.1. „Scanning the Forms“ as well as the separately available scanstation manual, which is available in the menu "System Information / Documentation".

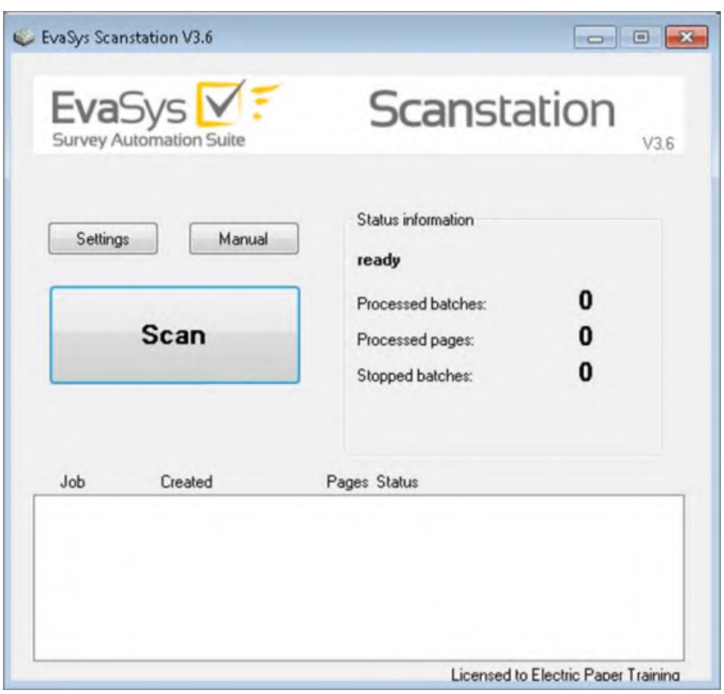


Figure 735: Scanstation

Scan Upload

The Scan Upload allows you to upload questionnaires that have been previously scanned with a suitable document scanner or multifunction device directly via the evasys interface, or alternatively via scanstation light. The upload function is available for administrators and subunit administrators as well as in active user accounts. It is therefore particularly suitable for decentralized evaluation projects.

In cloud standard systems the scan upload is licensed by default instead of the scanstation. In suite and cloud premium systems it must be licensed additionally. In contrast to the scanstation, the scan upload has no functions for immediate troubleshooting. For further information, see chapter B 4.2. „Reading the sheets with Scan Upload and Scanstation light“.

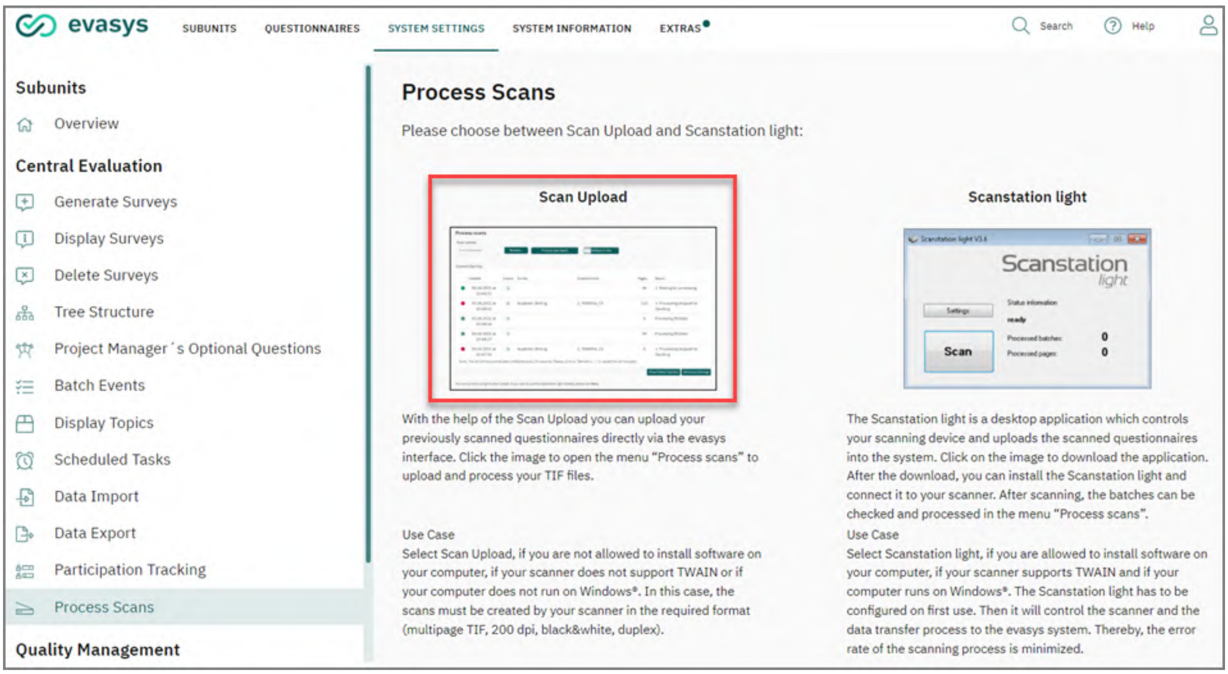


Figure 736: Scan Upload

VividForms Designer

The VividForms Designer is an additional tool for creating questionnaires that offers much more extensive possibilities for graphic design than the VividForms Editor (e.g. multiple columns, landscape format, free positioning of graphic elements, free configuration of font sizes etc.). The application is installed locally and can also be used offline. The license must first be assigned to the respective user in the license management ("Named User" license). Depending on requirements, one or more VividForms Designer licenses can be purchased.

For more information on functions, see the separately available VividForms Designer manual, which can be downloaded from the "System Information/Manuals" menu.

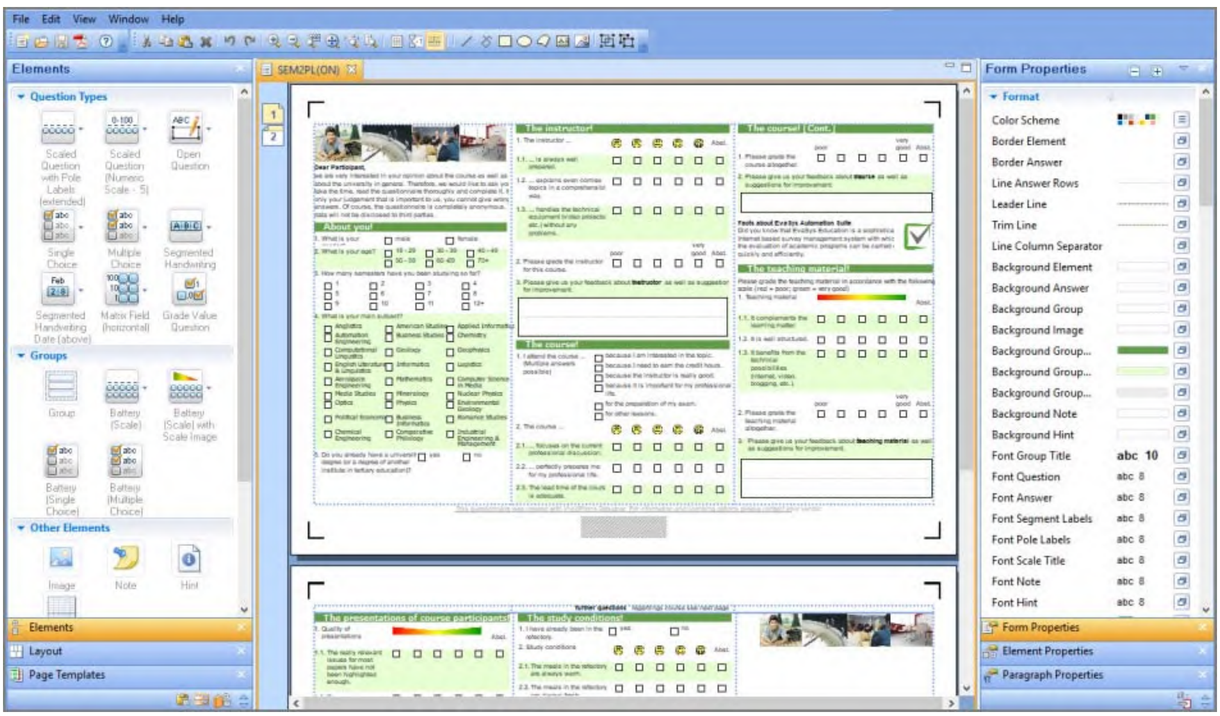


Figure 737: VividForms Designer

ICR Module

The ICR module enables automatic handwriting recognition via ICR (Intelligent Character Recognition) for segmented open questions. This can be useful if you want to capture short handwritten entries such as numerical values in the medical field (admission date, body height, body weight, etc.) or personal codes for longitudinal analyses.

If licensed, handwriting recognition is available for all questionnaires in the system that contain ICR questions. Numerical as well as alphabetical and alphanumeric values can be read. The recognition rate of numerical values is very reliable and is over 99%. For the processing of alphabetic or alphanumeric data, verification is necessary, since the recognition of this information is about 90% (alphabetic) or 74% (alphanumeric) due to the larger character sets. In the case of alphanumeric entries, the character set of the corresponding classifier can be restricted per questionnaire so that only selected characters are permitted in order to increase the recognition rate. For further information on ICR questions, please refer to the VividForms Editor Manual and the evasys Technical Guide.

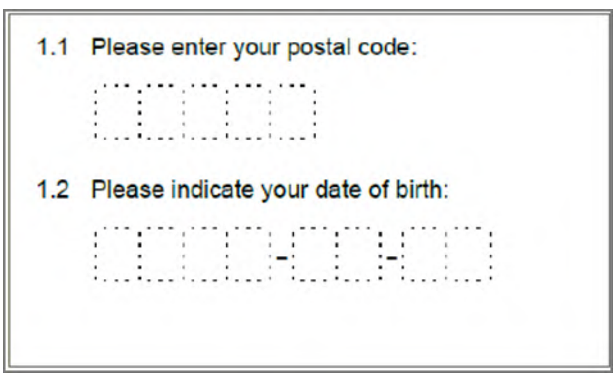


Figure 738: ICR Questions

Data Bridge

The Data Bridge enables the connection of third party systems or the transfer of data from an external data source via ODBC connection or CSV import. By default, it is possible to import course and participant data, for example from campus management systems.

In addition, the licensed version allows extensive automation of data transfer. The import of data can be time-controlled (e.g. once a week / semester / year) and offers extensive possibilities for data cleansing and validation. Beyond that, surveys can be generated automatically and triggered via time control, resulting in an almost fully automated system.

For further information on setup and use, please consult the evasys Technical Guide.

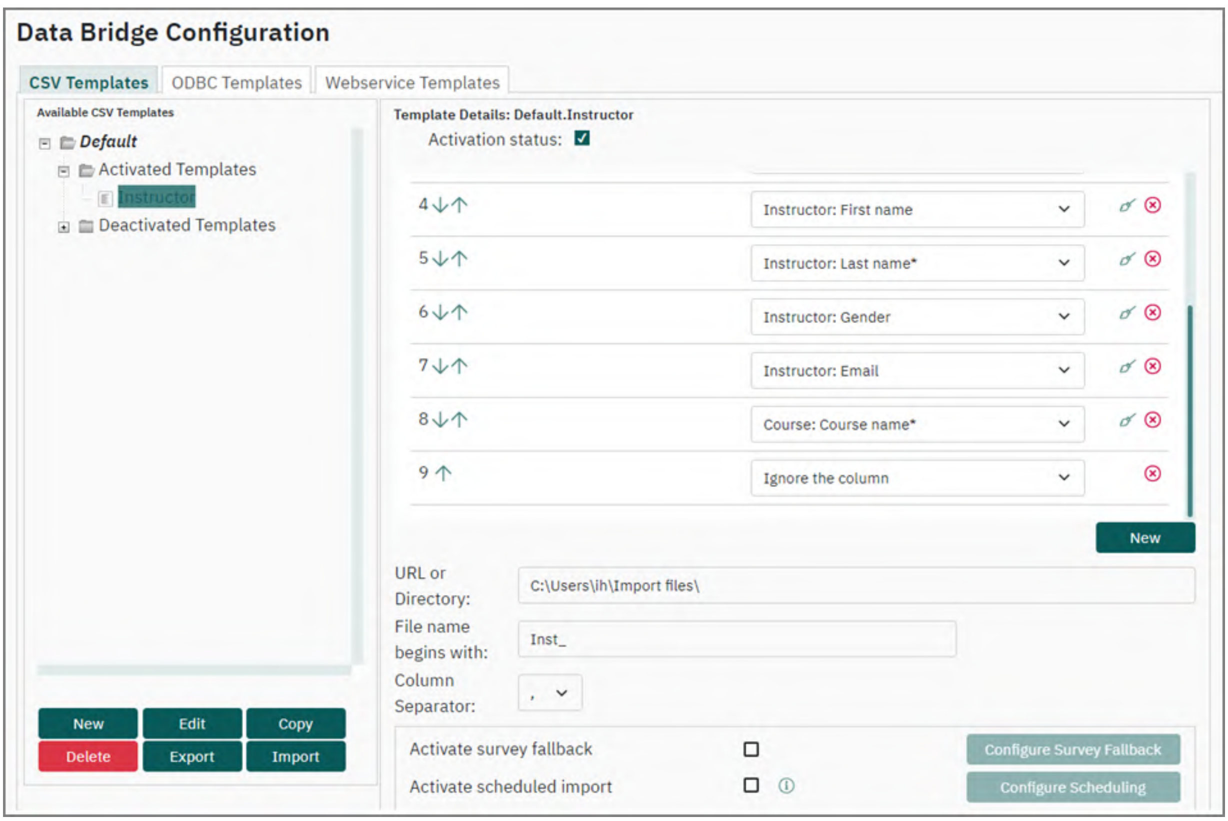


Figure 739: Data Bridge

Data Access Layer

The Data Access Layer (DAL) is a tool that gives you extended access to the (raw) data of your surveys for the purpose of in-depth analysis of your survey data. The DAL transforms the internal evasys data into five data tables (forms, organizational data, raw data of the results, result statistics, participants). An ODBC database connection allows you to make evasys data available in countless external applications such as Business Intelligence Tools (BIRT, Qlik-View, SAP Crystal Reports, IBM Cognos), databases (MS SQL Server®, Oracle) or Microsoft Excel®.

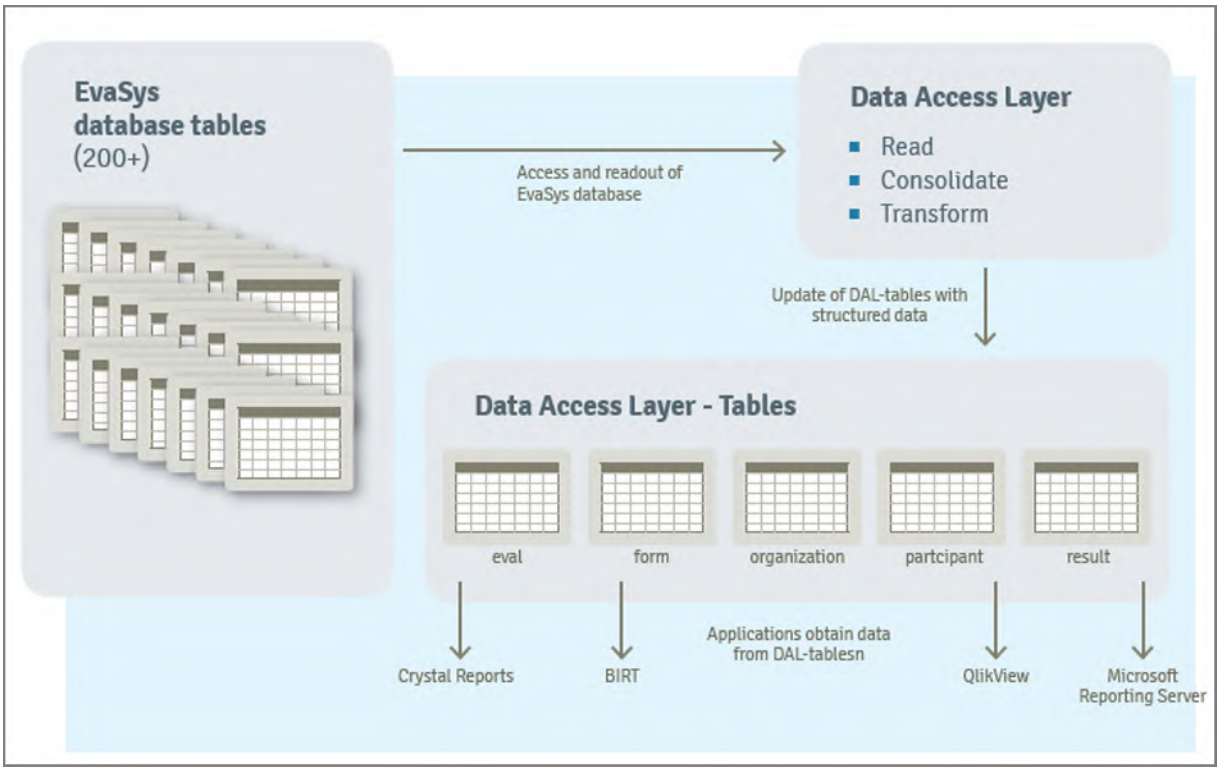


Figure 740: Data Access Layer

LTI Interface

The LTI interface enables data exchange between evasys and Learning Management Systems (LMS) such as Moodle, Blackboard or Canvas, provided they support the LTI standard for data transfer. In the LMS, access to online surveys as well as survey results can be made available by displaying information on evasys surveys (links to online surveys, information on response rates, etc.) in the student and teacher views. The presentation of content can be configured by using HTML templates and CSS stylesheets.

For further information on the possibilities of the LTI interface see the evasys technical guide.

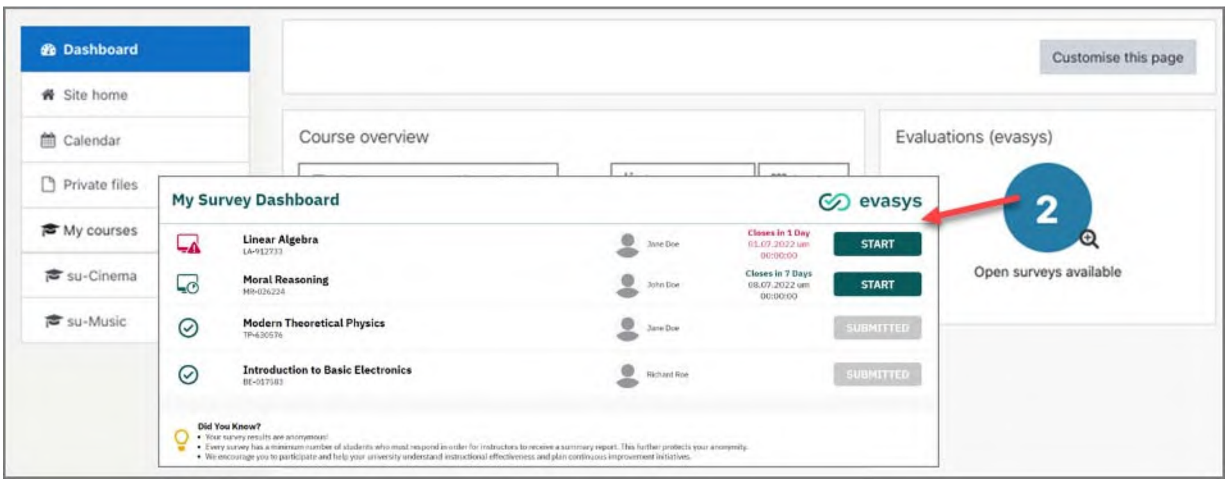


Figure 741: LTI Interface - Example Moodle

SOAP API

If licensed, the evasys SOAP API interface is available with extensive functions for connecting external tools or web-service-based remote control of the evasys system. With the help of your own development resources, e.g. connections for the uni- or bidirectional data exchange of course and survey data between evasys and third party systems can be realized, or certain processes and functions in evasys can be externally controlled and executed.

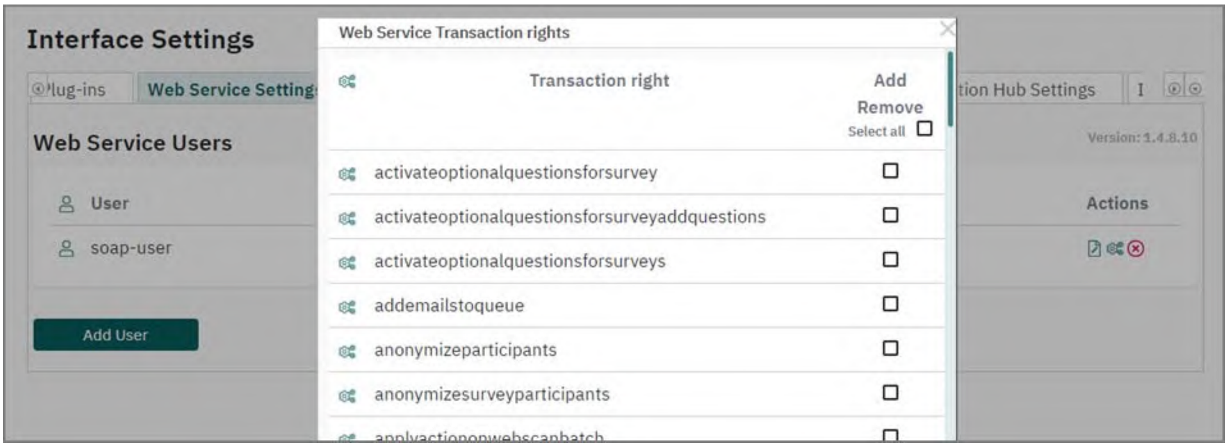


Figure 742: SOAP API

Research and Teaching

The research and teaching license offers you the opportunity to conduct survey projects outside of quality management. Due to the extensive implementation and evaluation options, you can also benefit from the advantages that evasys offers in many other fields of application.

With the additional license, students and researchers can carry out all survey projects, such as (student) research and third-party funded projects or final theses. It is assumed that these evaluation projects will be carried out within regular university operations. The license can be used by university staff, lecturers and students.

You can purchase a license extension for your existing evasys system or installed the license parallel to an existing evasys system, if the collection and evaluation of decentralized survey projects is to be completely separated from the existing evaluation data.

Dual Server Option

The dual server option extends the operation of evasys from a single server system to a dual server system. By default, the evasys system runs on a server which is accessed by all users (administrative users and online survey participants) for all processes and tasks. The dual server option allows you to outsource access of online survey participants to a separate server. As a result, the load on the evasys main server is reduced which has a positive effect on the performance of the system, e.g. in the case of online in class evaluations which temporarily lead to high access rates. Furthermore, the database server which contains sensitive evaluation data, can only be made available in the internal network if necessary, so that only the online survey server can be reached from outside.

The license requires the additional provision of a second server. If you are interested, we will be happy to advise you individually. Further information on the dual server option and system performance can be found in the evasys technical guide.

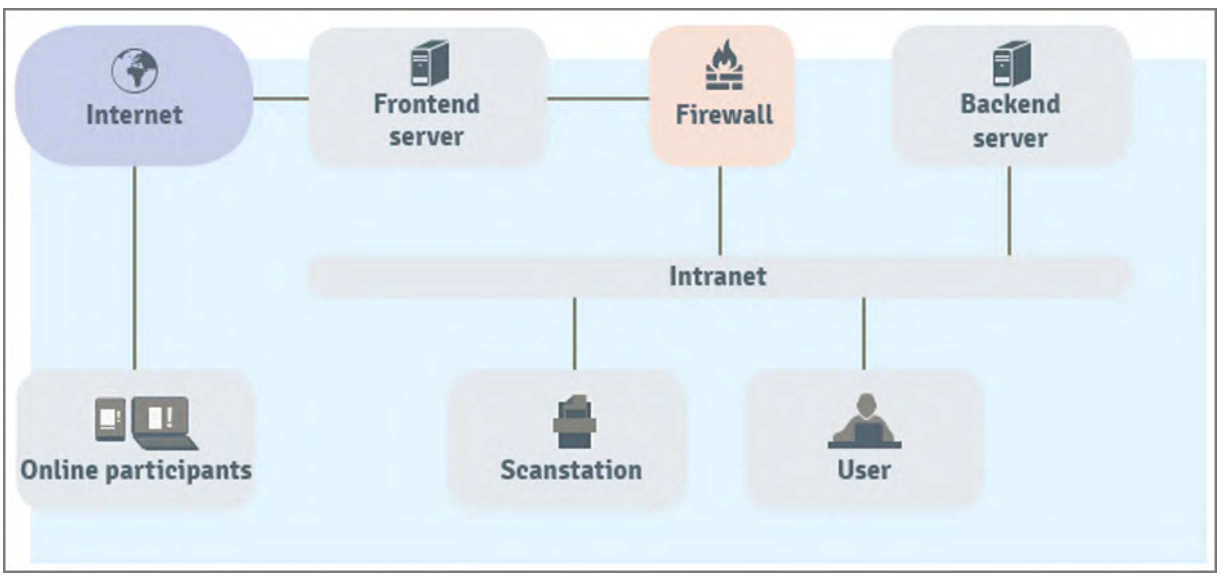


Figure 743: Dual Server Option

1.7.3. Electronic Activation

The electronic activation is used as a software protection for evasys. It more and more replaces the formerly used USB Dongle and thereby allows a protection without a hardware key.

When using a license with electronic activation, specific system settings are connected to the activation. These system settings may not be changed as otherwise the activation will expire and the system has to be re-activated. If evasys is not activated you cannot continue working with the system. This means that users cannot log into evasys anymore and it is no longer possible to capture data, neither paper based nor online. Only the administrator can log into evasys to carry out the activation, check the system settings and view the license information.

As an administrator you can check at any time if the activation is valid. This information is displayed in the license administration in the menu “System Information”. Here you can find an entry stating if the activation is valid or invalid.

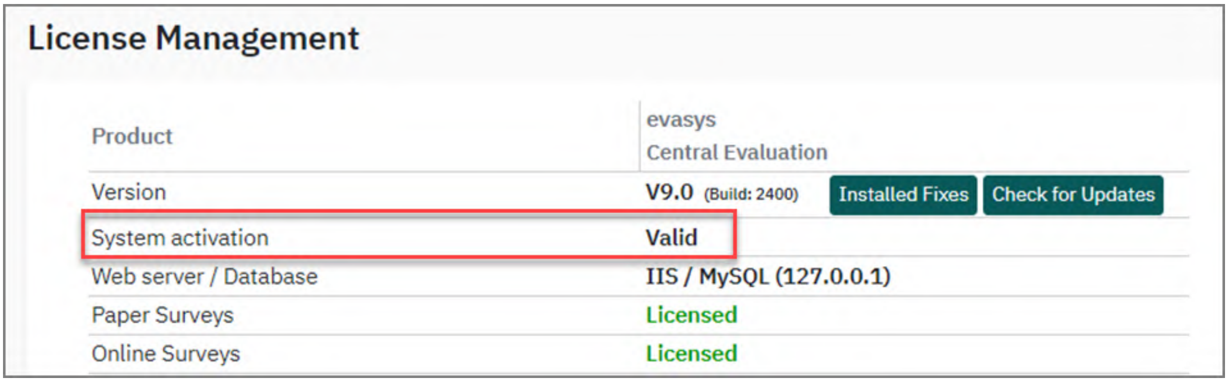


Figure 744: Information on Activation

Several explanatory texts in the System Settings and the License Administration indicate which settings can lead to the activation becoming invalid.

Should your system be protected by activation, in the license administration a warning message will be displayed.

Settings which may not be changed in the evasys Settings (menu “System Settings/ evasys Settings”) are also marked by red warning messages.

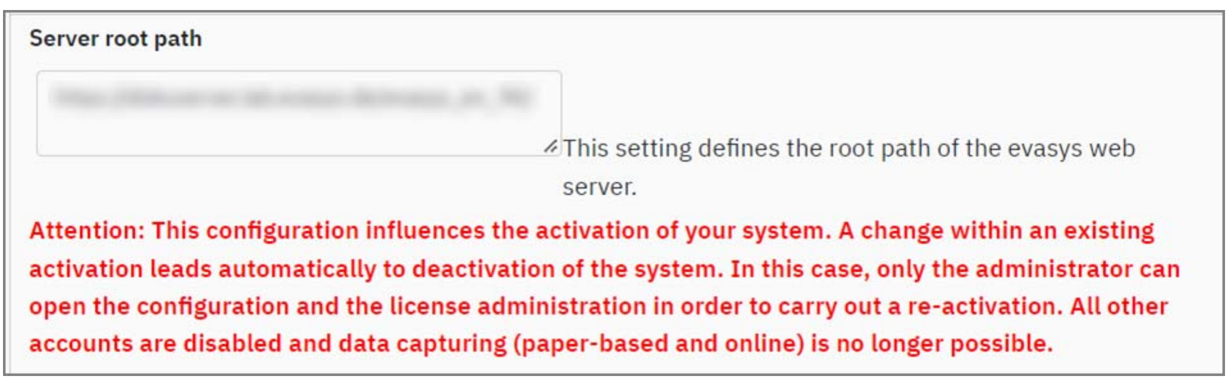


Figure 745: Activation: Warning Message in the System Settings

If the activation has become invalid, you will have to log in as evasys administrator to access the activation information and to request an activation file. To do this, you will have to download the file “info.act” from the activation screen which is displayed directly after logging into the system. This file has to be sent by email to the evasys support. The support team will then send you an activation file which has to be uploaded in the activation screen. A new activation can only be requested during support times.

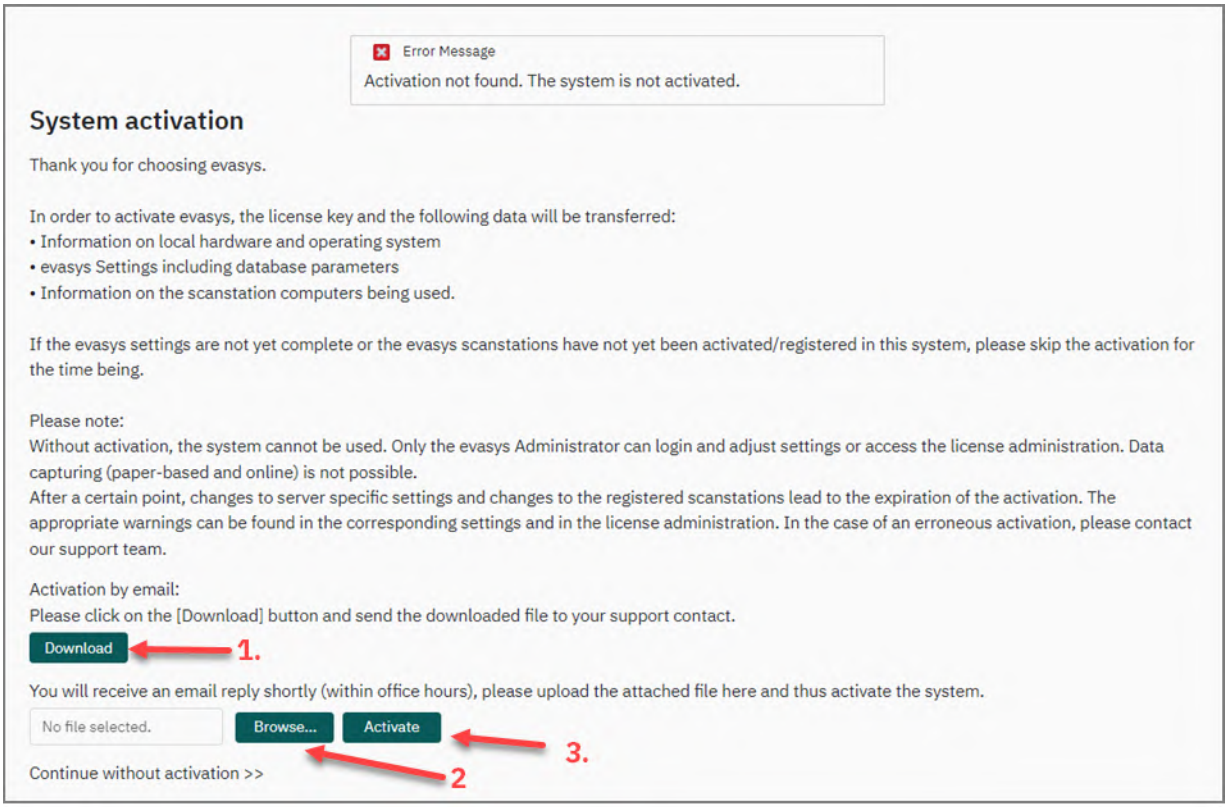


Figure 746: Activation Screen

The following settings are relevant for activation. Changes to these settings result in the activation to expire:

- Customer name (System Information/License Administration)
- License key (System Information/License Administration)
- IP address of the evasys server
- MAC address of the evasys server
- IP address of the first Scanstation
- MAC address of the first Scanstation
- Server root path (System Settings/evasys Settings/Network Settings)
- Server address for online evaluations (System Settings/evasys Settings/Survey Online)
- IP address mail server (System Settings/evasys Settings/Network Settings)
- Name of the database
- Database host

1.7.4. Administration of User Accounts

If you have a license where the number of user accounts in the system is restricted, you can process as many questionnaires as you need, but you may only create a limited number of users in the system. The following user accounts consume one license: Instructor, Dean and Module. All other users such as report creators, data entry assistants etc. will not count against the license.

The number of available user accounts for each subunit can be freely determined by the administrator and as such be limited. This possibility exists for limited as well as unlimited number of users. Each user of the type Instructor/Trainer, Dean/Subunit Manager and each module requires a user license. All other user types do not consume licenses.

Via a new button [Assign to subunits] in the license administration, the administrator can display an overview of the existing subunits and limit the number of user accounts per subunit.

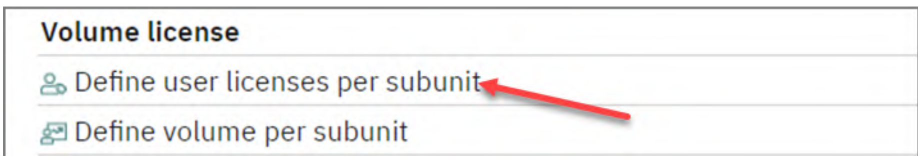


Figure 747: Administrating User Licenses

By default, the number of user licenses for each subunit is not restricted, this means, that any number of users can be created in each subunit, until the quota of user licenses has been exhausted.

To make restrictions per subunit, remove the tick from the checkbox next to the option “unlimited“ for each subunit. In the column user licenses in the input field, you can now specify the maximum number of licenses allowed per subunit. For each subunit you are shown how many user licenses are currently in use. At the end, click on [Save] to apply the settings.

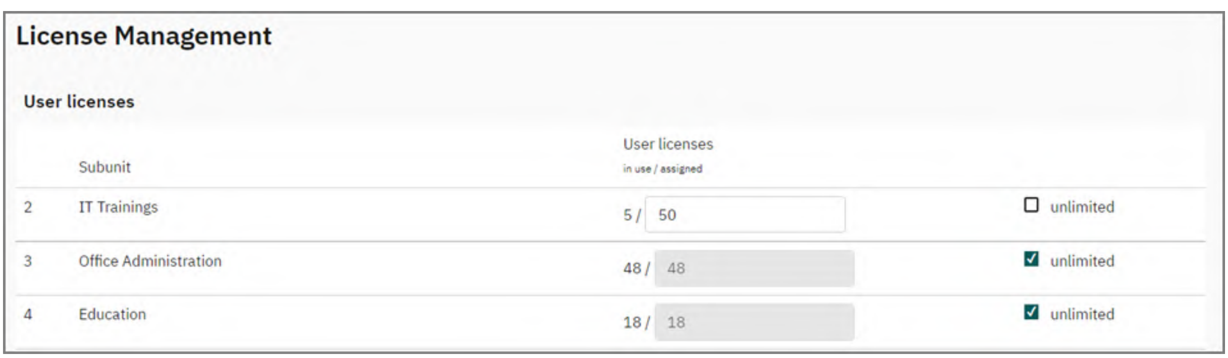


Figure 748: Limiting User Licenses

Note:
If you have connected user accounts to one another using External IDs, the number of licenses in use displayed within each subunit may differ from the number of users created within that subunit. For more information on using External IDs, see chapter B 2.1.2. "Generating and Managing User Accounts", Section “Using External IDs”.

Alternatively, restricting the number of licenses available can be undertaken directly in the details of a subunit. In the area “Assign user licenses”, the administrator can adjust the number of licenses retrospectively or define this directly when creating the subunit.

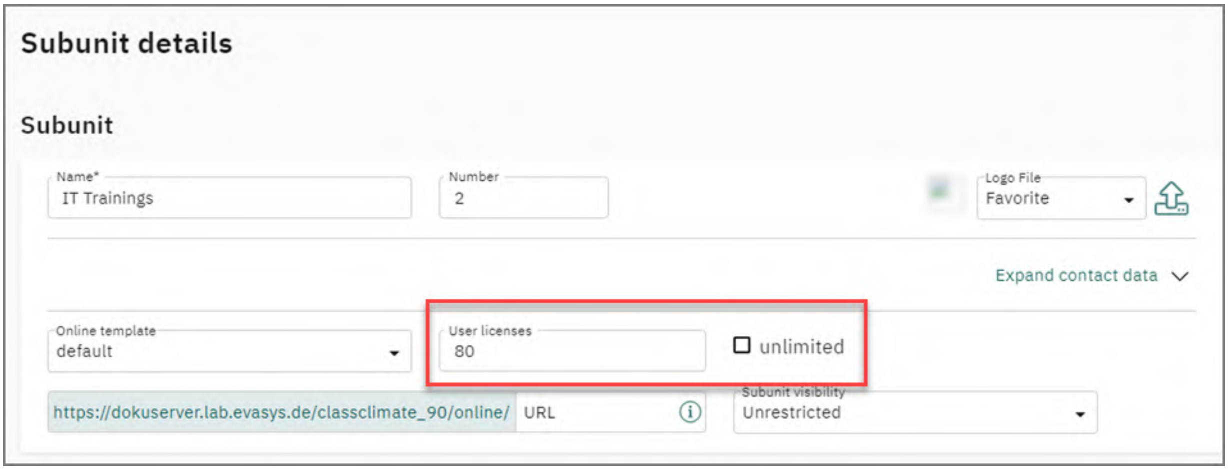


Figure 749: Restricting User Licenses in the Details of a Subunit

The subunit administrator cannot make any of his own settings here. S/he can, however, see in the subunit details how many licenses are available to him and how many have already been used.

Once a subunit has reached the established limit of user licenses, no new accounts can be created. The same is true when moving users into subunits whose contingency is already exhausted. When creating a new subunit, a warning is shown if all accounts have already been distributed elsewhere.

1.7.5. How to Use a Volume License

The license model “Volume license” allows you to create as many users as desired. Instead there is a limitation in the amount of forms you can capture, i.e. in a determined period of time (generally one year) you can only capture a specific number of datasets in paper or online form.

For each data set one unit will be subtracted from the overall volume. A four-page questionnaire, for example, counts as one data set, which means the length of the questionnaire is not taken into account. The subtraction takes place when scanning the forms and releasing the batch or when submitting an online form, but not when printing forms or generating PSWDs.

Also in case of a volume license the license key has already been entered during installation and the volume file has been uploaded to the system. In case of a change in your license data you will receive a new license key, which you can add in the menu “System Information/License”. If only the volume changes, you will receive a new volume file, which contains the following information:

- **Customer Name:** Unique name for identification. While importing the license it is checked whether the customers exact name matches. When the details of the license does not match the stored customer in system, a respective message appears.

- **The volume for each period of time:** This data tells the system how many data-sets you can use (i.e. how many paper or online-questionnaires you may read in).
- **Period of validity**, i.e. when does the cycle start resp. end.
- **Number of cycles**: Normally a volume license has an indefinite number of cycles with a duration of one year each. As soon as one cycle has expired, the license is renewed automatically and a new cycle starts.

In addition to an annual volume, you can purchase volume for one-off consumption at any time if the annual volume is not enough. The annual volume pauses as soon as the consumption volume has been uploaded and is now used until it is used up or the next period begins. The remaining volume expires and cannot be transferred to the next period. Consumption volume does not renew when the license period runs out.

If you click on the button [Details] to the right of the line “Volume license” (in the window “License Management“) you can see a new window with detailed information about the volume licenses. In addition, a graph displays the volume usage during the year. To upload a new volume file you first have to delete the old one. Then you can select the volume file, which you have received by evasys GmbH and stored on you computer, with the help of the button [Browse].

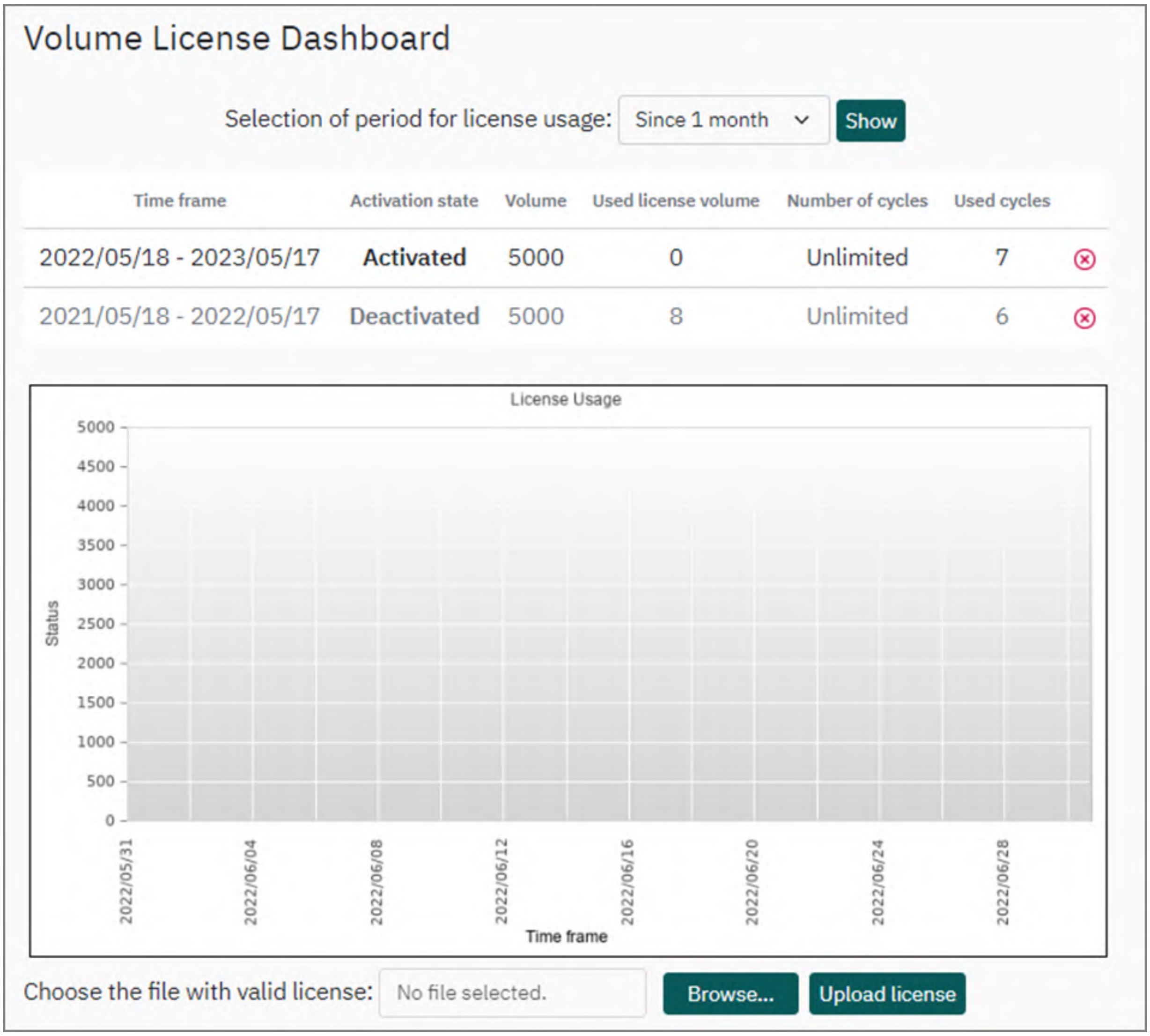


Figure 750: Selecting the Second License Key

A click on the button [Upload license] activates the volume license and displays a message about the successful activation as well as the details of the license:

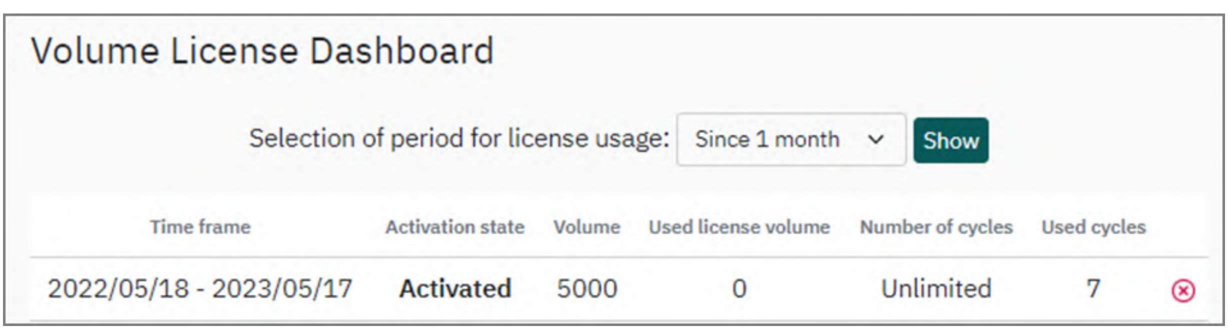


Figure 751: Volume License Added Successfully

When you click on the button [Back] you can see the window [License Management] again. Now the license is activated:

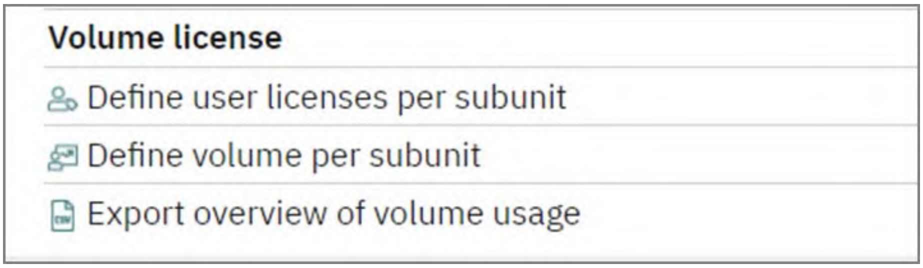


Figure 752: Activated Volume License in the License Administration

If the available volume is running low, a warning message is shown when the administrator logs into evasys. In addition, you can define two warning thresholds for a low residual volume in the "System Settings" menu in the section "Survey/General". If the volume falls below the defined thresholds, the system sends an automatic e-mail to the administrator with a warning. If necessary, you can purchase extra volume at any time.

If the volume is exhausted, it is no longer possible to process further data. You should therefore check the volume level on a regular basis.

The remaining volume is permanently transferred from the evasys server to the scanstation. It is displayed in the scanstation dialog so you can directly check the volume level before scanning forms.

If you are planning to do one or more online surveys, please make sure beforehand that enough volume is available for the number of expected returns. You can check the volume level in the License Management menu. If the volume is consumed during an online survey, the participants of this survey will receive an error message that the PSWD is not correct when trying to log into the survey. They will not be able to take part in the survey.

If the volume of a scanned batch exceeds the available volume, an error message appears in the scanstation. If in the stopped stack several surveys are scanned, it can happen that some surveys were still completely processed correctly before the volume was consumed.

In the error message, processed and unprocessed surveys are listed. Note these messages to avoid that batches are scanned multiple times. For more information on the error messages, please refer to the scanstation manual.

When the volume is consumed you can still work with the existing evasys data without any problems. However, it is not possible to process further data.

If desired, you can divide the available license volume onto the different subunits. This means, the available volume can be individually restricted per subunit.

Figure 753: Define volume per subunit

When you click on “Define volume per subunit” a window opens which allows you to assign license volume to the single subunits. Subunits can either not be restricted (i.e. only the overall license volume will be limiting the response volume), or they can be set to a defined maximum value. Please note, that in general it is possible to assign more than the overall volume to all subunits.

Click [Save] to store your settings.

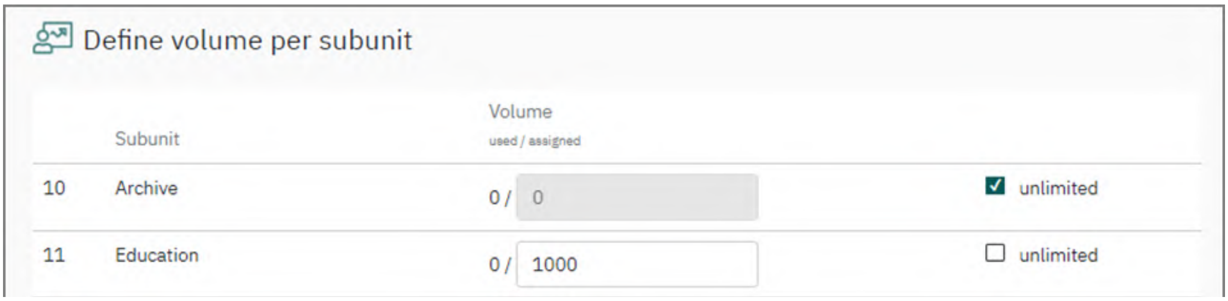


Figure 754: Assign volume

In the license management overview you can furthermore export the current volume usage of the single subunits as a CSV file. Thereby, the volume usage can be completely tracked.

Figure 755: Export volume usage

Subunit administrators can also check the available volume and download a volume usage overview for their subunits in the menu “System Information / License Management”.

Figure 756: Volume overview in the subunit administrator account

1.8. Scanstation Setup

(not Cloud Standard)

When a new version of evasys is installed, either an update or an upgrade, as a rule you also have to update the scanstation. Since the scanstation is usually not on the evasys server but located on a local client computer, the relevant update must be made here separately.

Once started, the scanstation automatically checks whether there is an update available on the evasys server. If this is the case, the update can be downloaded directly in the form of a ZIP file.

In addition, via the evasys interface, the administrator has the ability to check whether an update is available or not. Should an update be available it can be downloaded as a ZIP file and installed onto the scanstation computer.

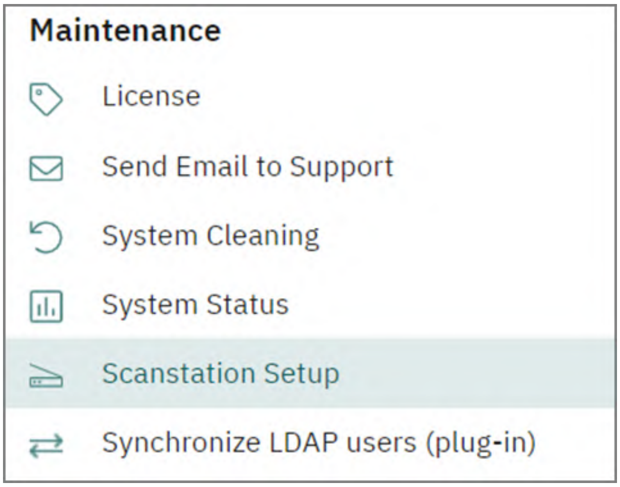


Figure 757: Scanstation Setup

Note:
In order to execute the scanstation setup, administrator rights need to be available on the scanstation computer. Therefore, if necessary, please refer to your IT department. For further information about the scan station please consult the evasys Technical Guide.

1.9. Performance Considerations

The following paragraphs offer several references with regard to optimizing system performance.

- Performance Statistic
- List of all Active Users Logged In

1.9.1. Performance Statistic

(not Cloud Standard)

In the menu “System Information/System status”, you will find details to the current system utilization.

The performance statistic shows the time needed to execute an internal function, which is called-up every minute. Thus, it represents an indicator for the workload of the system at the respective time of measurement.

When a series of measurements are located in the red zone for a longer period of time, this indicates a state of overload which can impair system performance for users or participants in online surveys. From these statistics, (subunit) administrators can make decisions regarding optimization of peak access times.

In particular, surveys that are conducted live during a course can lead to a temporarily very high system load, depending on the number of parallel surveys and the number of participants. This can have a negative effect on the survey perfomance. If you are planning such surveys, talk to your IT department beforehand. Detailed information on system performance and the technical requirements for smooth evasys operation can be found in the evasys Technical Guide.

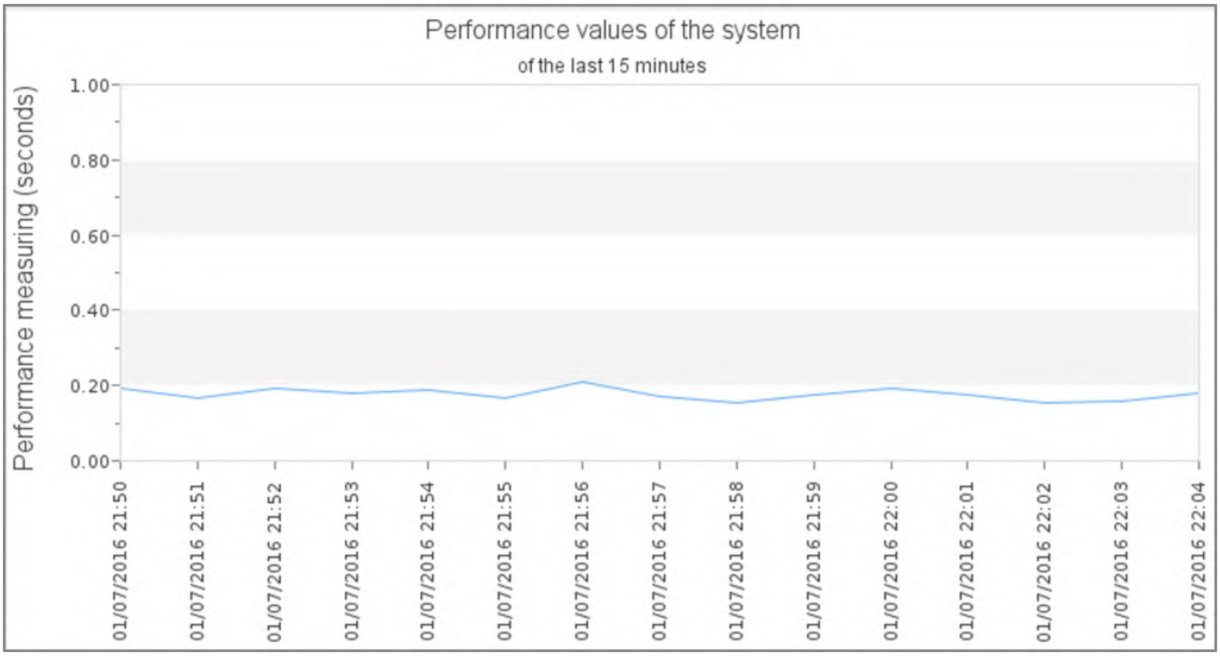


Figure 758: Overview of System Utilization

1.9.2. List of all Active Users Logged In

As a (subunit) administrator, you will find a list of all logged in evasys users and online survey participants at the bottom left of every evasys page. In this way, you can see how many people are currently online and avoid an overload due to a high number of people being logged in at the same time.

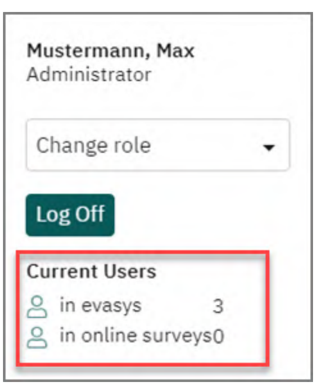
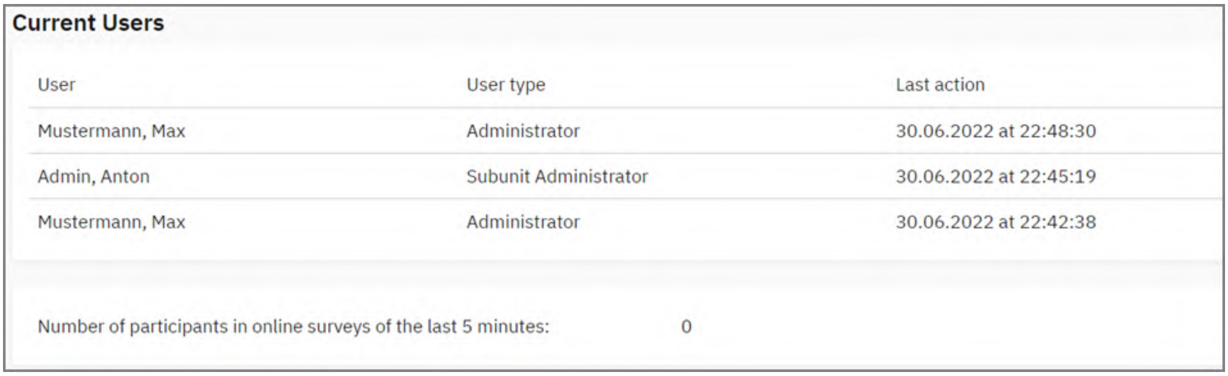


Figure 759: List of Active Users

By clicking on “Users logged in” or “Online surveys” you will automatically reach the menu “System Information” in the area “System status”. There you will find a detailed listing of all users currently logged into the system:



Current Users

User	User type	Last action
Mustermann, Max	Administrator	30.06.2022 at 22:48:30
Admin, Anton	Subunit Administrator	30.06.2022 at 22:45:19
Mustermann, Max	Administrator	30.06.2022 at 22:42:38

Number of participants in online surveys of the last 5 minutes: 0

Figure 760: Detailed Information of all Active Users

You can sort the active users according to name, user type and last action, by clicking on the relevant column head.

1.10. Deletion Log

The deletion log tracks all data deletion events in the system. It is not possible to delete from the deletion log.

The following deletion processes are logged in this protocol:

- Subunits
- Users
- Courses
- Surveys
- PSWDs
- Questionnaires
- Folders (Active Accounts)

Each deletion log record will contain the following information:

- User: Who has deleted the data?
- Object Type and Description: What was deleted?
- Date: When was the data deleted?
- ID of triggering activity: Which deletion event chain has caused the deletion of this element?

The top section allows the selection of object types to be displayed (multi selection using the CTRL key). It is also possible to define the number of records per page.

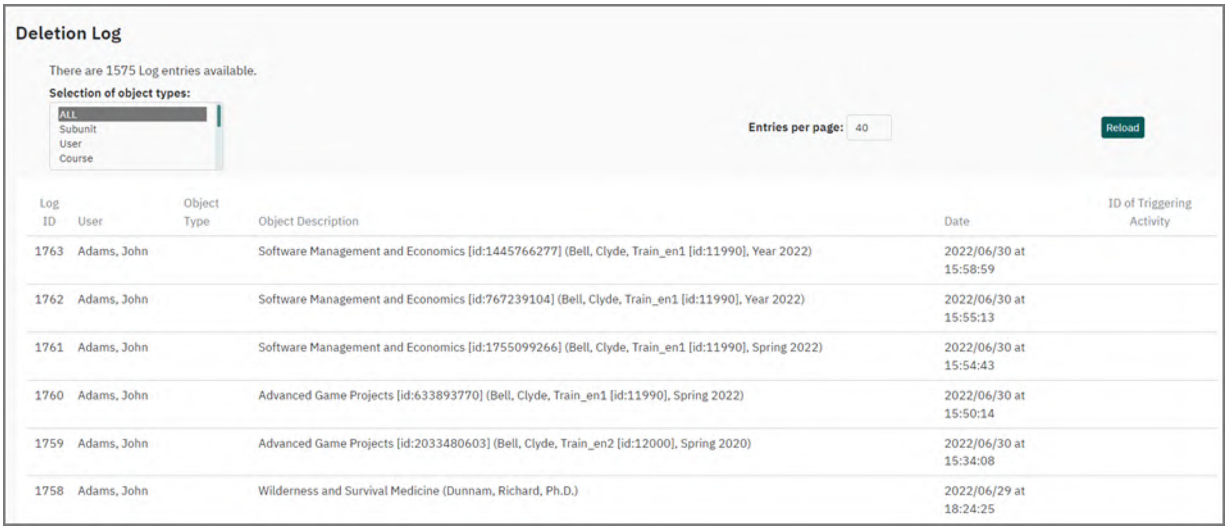


Figure 761: Deletion Log

Old entries in the deletion log can be automatically deleted. With the help of a system setting you can define the retention periods for entries in the log. To do this, go to "System Settings/Data Privacy/Retention Period: Deletion Log" and define the number of months you would like to keep the data in the system.

1.11. System Cleaning

You can delete the files that you do no longer need via the system cleaning. For this purpose you have to define a period to erase dispensable data. You can delete the following elements:

1.11.1. PSWDs

When you choose a period and click on the button [Delete PSWDs] you delete all the PSWDs of the chosen period which have not been used by that time.

Please note: You cannot delete PSWDs of open surveys here. The deletion will only concern surveys that have already been closed.

Figure 762: System Cleaning

1.11.2. Deliveries

As regards the deletion of PSWDs you can delete all deliveries for a chosen period. (The deliveries can be found in the menu “System Information” on the left hand in the menu.)

Old entries in the deliveries can also be automatically deleted. With the help of a system setting you can define the retention periods for deliveries in the log. To do this, go to “System Settings/Data Privacy/Retention Period: Deliveries & Log Book” and define the number of months you would like to keep the data in the system.

1.11.3. Entries in the Log Book

The log book records messages, warnings and failures of the system (for detailed information see below). When choosing a period you can also delete those elements here.

Old entries in the log book can also be automatically deleted. With the help of a system setting you can define the retention periods for information in the log. To do this, go to “System Settings/Data Privacy/Retention Period: Deliveries & Log Book” and define the number of months you would like to keep the data in the system.

1.11.4. Delete Compilations and Subgroup Reports

You can delete the compilations and subgroup reports of the chosen periods here (i.e. the data the system uses to create the reports of the report creator).

When clicking on the button [Show reports] a new window opens. There you can define the reports you do not want to delete.

You cannot delete the data you have created in your surveys, it is only possible to delete that of the report creator.

When the report creator compiles some reports, when s/he creates profile lines etc., the system always duplicates the raw data to obtain the data for the new reports. The PDF reports are based upon this data. Thus no PDF report is available as a file in the system; every report is created on the fly using the raw data or the copies of the data when the user calls up the report.

In a sense the deletion of the data copies also implies the deletion of the report of the report creator. But, in fact, when clicking on the button [Delete reports], you only delete the duplicated data which overloads your system.

1.11.5. Delete images of answers to open questions

Figure 763: Delete images of answers to open questions

This menu allows answers to open questions from paper-based surveys to be deleted when they are no longer needed for evaluation. This does not affect images which are included in aggregated reports or in surveys of active instructor accounts (decentralized evaluation, see section chapter A 2.3.2. "Active Instructors Accounts".

Note:
If you delete the images, this process is irrevocable and cannot be undone. Only delete images, if you are sure that you do not need the answers of open questions from paper-based surveys anymore. Anonymized answers or responses from online surveys are not affected by the deletion.

Deleting the images of open questions will reduce the backup size and in particular the time required for backing up the data base. See also chapter A 3.4. "Notes for Backups".

1.11.6. Deleting original scans

This menu allows the PDF file of the original scans from paper-based surveys, which can be displayed in the details of the survey, to be deleted for all periods at a time.

Note:
The deletion of the original scan is irrevocable and cannot be undone.

The deletion of the original scans can significantly reduce the size and handling of the backup file. It may also be necessary for reasons of data privacy to delete these images of the scanned questionnaires regularly.

Figure 764: Delete original scans

1.12. Analysis of Errors

1.12.1. Log Book

The log book reflects all the operations that occur in connection with the automatic capture of paper questionnaires.

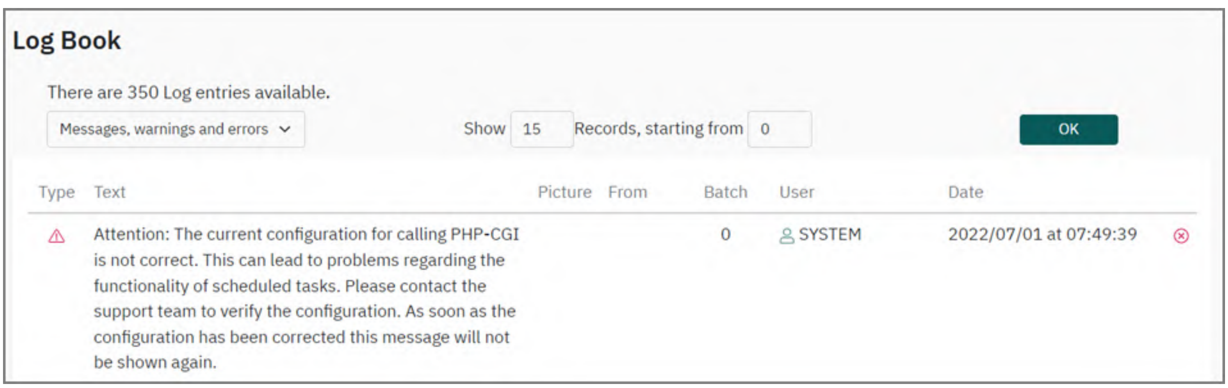


Figure 765: evasys Log Book

There are three types of notes: Notifications (indicated with a blue “I”), Errors (red cross) and Warnings (yellow warning triangle). By clicking on the user name all messages that relate to that user are displayed. By clicking on the survey name you are directed straight to the survey list.

For further information please refer to the evasys Technical Manual.

1.12.2. Mail Service Log

Emails from scheduled tasks are sent in the background by the service “Mail Service”. This service can provide detailed information in case of problems. All errors are documented in the menu “System Information/Mail Service Log”.

After each administrator's log in, evasys checks if any errors have occurred. If new errors have been noted, a message appears in the menu “Subunits” with a reference to the mail service log, where the error message can be confirmed.

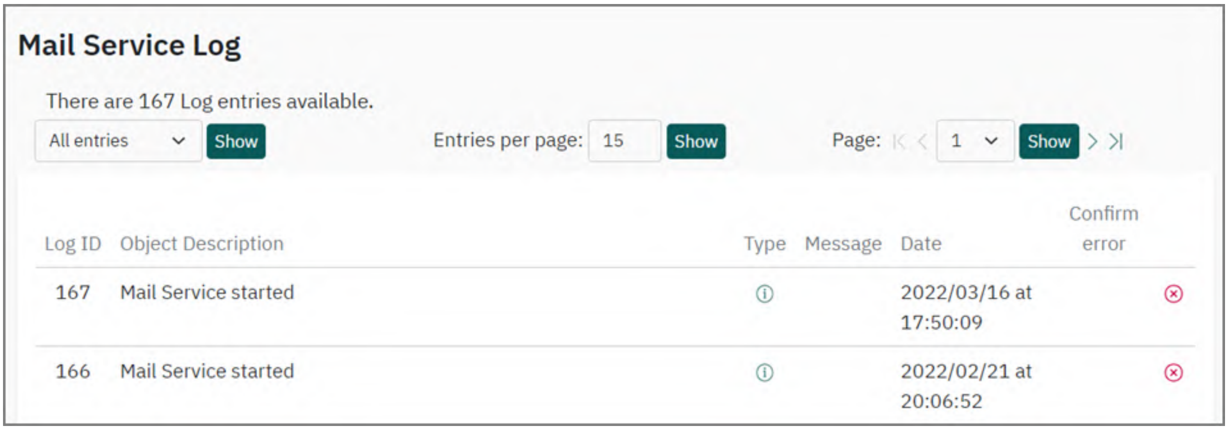


Figure 766: Mail Service Log

If the evasys server is temporarily switched off, after the new login a message appears reporting that the mail service does not seem to be functioning. When the mail service notifies evasys that it is active again, the message no longer appears upon login.

For further information on the mail service, please consult the evasys Technical Manual.

1.12.3. Data Import Log

In the menu "System information / Protocols / Data import Log" you will find log entries that are created for each import process. You can check here whether the import was carried out successfully or if errors have occurred. You can sort the lists according to the entries, display log files and delete old entries.

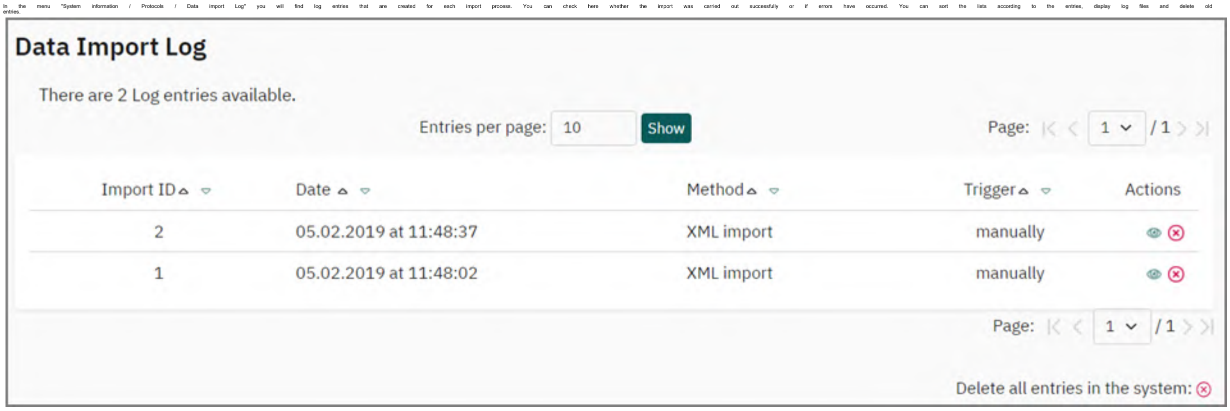


Figure 767: Data Import Log

2. Configuration Settings

2.1. Text Templates

In the menu “System Settings/Text Templates” the templates for email and letters are stored. Some of these have to activated in the settings first.

With the help of placeholders you can individualize text templates for your recipients (see chapter D 2.1.8. "Placeholders for Text Templates and Questionnaires"). If activated, email can be sent in HTML format and can be formatted with the help of an HTML editor (under “System Settings/evasys Settings/E-Mail Functions & Accounts/ Emails in HTML-Format”).

Furthermore you can define attachments for you emails and templates for the PDF letter for the report. These documents have to be uploaded to the system first (see chapter D 2.2. "Documents") .

Note:
Some option settings can also be defined specifically for individual questionnaires. Settings at questionnaire level have priority over general settings.

2.1.1. Viewing Email Texts and Text Templates

The key elements for these settings are the selected actions and the language. Headings, text and attachment or PDF template can be defined for this combination. The window for processing the text template is made up of five different areas.

Action

In the action box on the left you can select an email type or a letter text.

Language

Below the box “Action” you can select the language for the text. The default language is the system language.

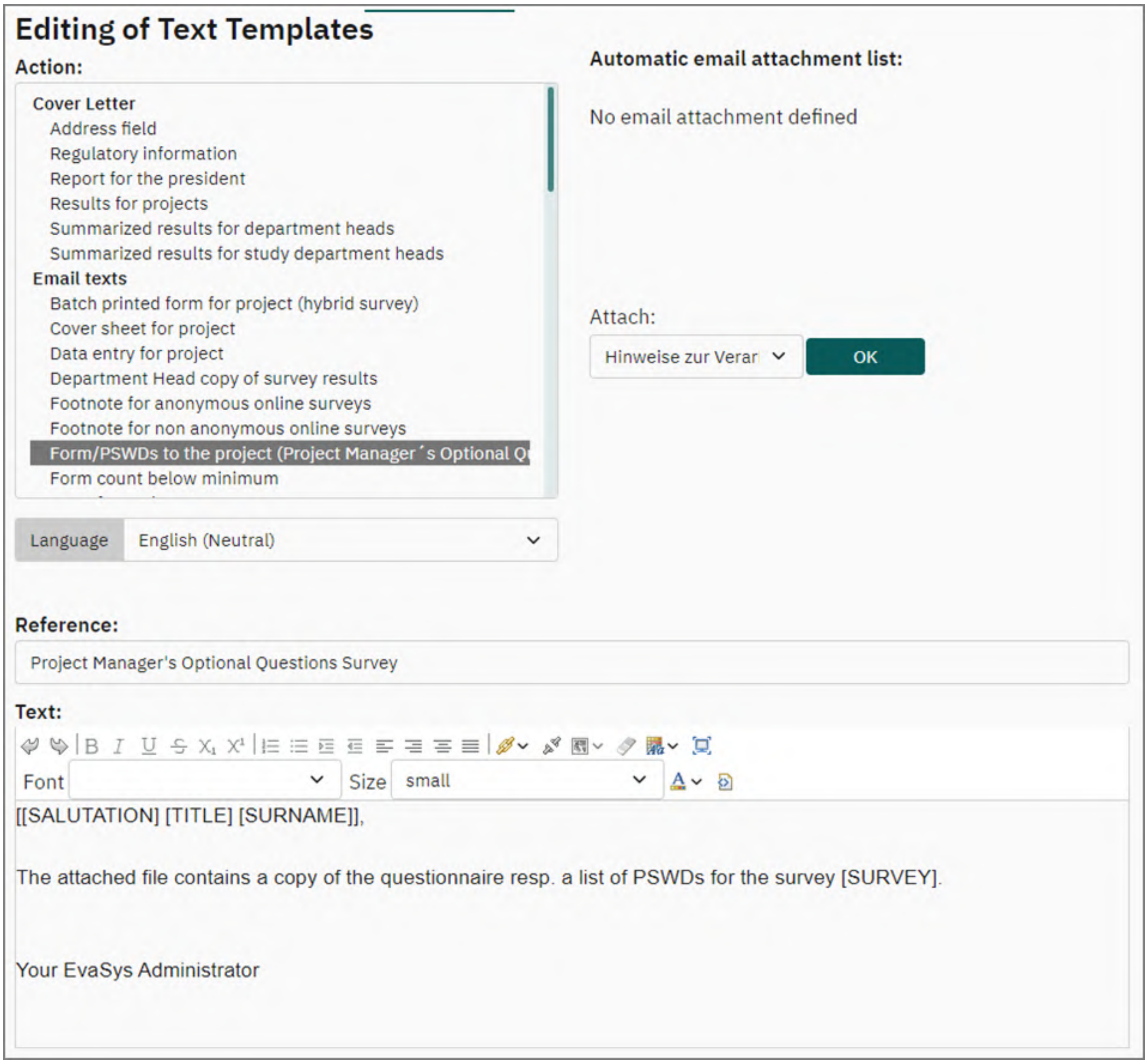


Figure 768: Editing of Text Templates

PDF Template or Email Attachment

If you selected in the “Action” box a PDF letter then you will see “PDF Template“, that is you can assign a PDF template for the layout to a given letter. If you selected in the “Action” box an email text then you can add here one or more attachments. Email attachments and PDF templates are saved by clicking on the button [OK].

Reference

Depending on what was selected in the “Action” box you can define the heading text in the PDF or in the email subject line.

Mail Text:

Depending on the option selected in the “Action” box you can define the text of the PDF letter or the email. Within the text you can make use of placeholders. Changes to the text can be saved by clicking on [save].

2.1.2. Cover Letter

The letter text for PDF reports can be defined in the menu “System Settings/Text Templates”. For using a letter, you must have activated the function “System Settings/Report Settings/Configuration/Generate letter”.

A one-page default letter can be used or you can define an individual PDF template with one or more pages.

Letter: Address field

For standard letters you can define the form of the address as long as no PDF template is used.

Letter: Regulatory information

The message informing the instructor which deans of studies received a summarized form of the results has been activated (self registering procedure).

Letter: Report for the president

The president receives the summary report on the indicators to all evaluated courses of an arrangement from elevation period and questionnaire.

Letter: Results for instructors

Here the text of the letter to the instructor can be deposited. With help of the placeholders [SALUTATION] [HEADLINES] [SURNAME] an individual address of the instructor is possible.

In the report creator account it is possible to send summary reports with the evaluation results to different authorities via the menu “Additional Reports”. For this, in each case individual letters are used.

Letter: Summarized results for deans

A report on the indicators of a subunit for all evaluated courses of a specific period and questionnaire is created. The text and subject defined here are used for the standard letter as well as for a individual PDF template.

Letter: Summarized results for study deans

The dean of studies receives a summary report with the indicators for all evaluated courses. The selection is made by the deans themselves in their login account. The function “evasys Settings/Central evaluation/dean of studies” must be activated. A corresponding user account must be set up and used.

2.1.3. Email texts

First you will see a description of all message types and then you will find details to the various placeholders available.

Email: Batch printed form for instructor (hybrid survey)

Via the survey details of a hybrid survey the administrator sends an email with personalized questionnaires for each participant to the instructor of the course. In the attachment the instructor will find a ZIP archive which contains the questionnaires in PDF format. Each questionnaire will show an individual PSWD and the server address.

Email: Certificate of participation for online surveys

In the details of a questionnaire the dispatch of a certificate of participation by email is activated. The PSWD has been sent to the participant by email. The participant has just taken part in the survey and now receives an email with a confirmation.

Email: Cover sheet for instructor

This email is dispatched when the (subunit) administrator sends the cover sheet to the instructor as a PDF file via the survey list or the details of a survey or if automatic dispatch of cover sheets is set in the menu “System Settings/Process Defaults”.

Email: Data entry for instructor

The manual capture of handwritten comments of a survey was concluded. If the option “Data entry assistant: Sending a report to the instructor” is activated in the menu “System Settings/evasys Settings/Functions”, the data entry assistant can send the report of the survey to the instructor.

Email: Dean copy of survey results

If the function “evasys Settings/Email Functions & Accounts/Dean's copy evaluation” has been activated, a copy of the PDF report is always sent to the dean of the subunit when a PDF report is sent to the instructor of the course. In addition, or alternatively the raw data can be attached as an Excel-readable CSV file (see “evasys Settings/Email Functions & Accounts”).

Email: Footnote for anonymous online survey

If PSWDs are sent by email to participants of an anonymous online survey, the email text is automatically complemented with a footnote with hints to the anonymity.

Email: Footnote for non anonymous online survey

If PSWDs are sent by email to participants of a non-anonymous online survey, the email text is automatically complemented with a footnote referring to the non-anonymous participation.

Email: Form for instructor

The administrator sends the questionnaire of a hard copy survey to the instructor from the survey list or the details of a survey. This can be automated after generating a survey in “System Settings/Process Defaults”.

Email: Information about result access to participants

If result access for participants is activated in the details of a questionnaire, an email which allows access to survey results can be sent to the participants after the online survey has been closed, either via the survey list, the survey details or via scheduled tasks. With the help of the placeholders [SERVER] and [PSWD] the participants receive access to the HTML report of the survey.

Email: Instructor's Optional Questions activated

Instructor's Optional Questions must be activated in the menu “System Settings/ evasys Settings/Survey”. An email is sent from “Subunits/Instructor's Optional Questions” if the administrator activates the function. The text contains a link the instructor can use to open the optional questions.

Email: Instructor's Optional Questions deactivated

Instructor's Optional Questions must be activated in the menu “System Settings/ evasys Settings/Survey”. The administrator has again deactivated the Instructor's Optional Questions for the relevant survey in “Subunits/Instructor's Optional Questions”. An email is sent to the instructor informing about the deactivation.

Email: Instructor's Optional Questions reminder

Instructor's Optional Questions must be activated in the menu “System Settings/ evasys Settings/Survey”. An email is sent from “Subunits/Instructor's Optional Questions” if the administrator carries out the reminder to an activated instructor's optional questions process. The text contains a link the instructor can click to open the optional questions.

Email: Merged list of PSWDs for online survey participants (system-wide only)

In the System Settings (“System Settings / evasys Settings / Surveys Online”) merged timed emails for all surveys is activated independent of the used questionnaire (Option 2). If a participant now deposited for multiple concurrent surveys, s/he receives an invitation e-mail containing a list of all for him planned surveys. The placeholder [DIRECT_ONLINE_LINK] is replaced by a list of direct links to the surveys.

Email: Merged reminder for online survey participants (system-wide only)

In the System Settings (“System Settings / evasys Settings / Surveys Online”) merged timed emails for all surveys is activated independent of the used questionnaire (Option 2). If a participant now deposited for multiple concurrent surveys, s/he will receive in the event of a reminder e-mail with a list of all the surveys, which s/he has not yet participated. The placeholder [DIRECT_ONLINE_LINK] is replaced by a list of direct links to the surveys.

Email: Meta data for archive-email (system-wide only)

If the option “Archive mailing of PDF reports” is activated in the System Settings under “System Settings/evasys Settings/Email Functions & Accounts”, the reports and raw data are sent to the archive address. The email text contains all relevant information on the respective survey.

Email: Notification for instructor when survey has started

In the administrative dashbord of scheduled tasks sending emails to the participants was initiated. The switch „Inform the instructor of the course about the PSWD dispatchs“ is enabled when you create the planned operation. This text template can also be used to inform the instructor/trainer on the LTI interface. With the help of the placeholder [TASK_SURVEY_START_DATE] you can define the start of the survey, with the placeholder [TASK_SURVEY_CLOSE_DATE] when it ends.

Email: Notification at defined evaluation results

This email is sent if in the menu “Subunits/QM Notification” a notification threshold is set for surveys which exceed or fall below a specified quality index.

A definable person is informed about the evaluation result of a survey. The placeholder [SURVEY_QUALITYINDEX] indicates the achieved quality, e.g., 54%, the placeholder [DEFINED_SLA] the defined threshold, e.g., 60%. With the help of the placeholder [EXCEEDED_OR_FALLEN_BELOW] the text “exceeded” or “fallen below” is indicated. The placeholder [LINK_TO_QM_DETAILS] is substituted with a link to the QM Views.

Email: Notification at low response rate

The email is sent if in the menu “Subunits/QM Notification” a notification is set when a defined quality threshold is exceeded or not reached. A defined person will be informed on the evaluation result of a survey. The placeholder [SURVEY_QUALITYINDEX] shows the attained quality i.e. 54%, the placeholder [DEFINED_SLA] the defined threshold, i.e. 60%. With the help of the placeholder [EXCEEDED_OR_FALLEN_BELOW] the text “Exceeded” or “Fallen below” is displayed. The placeholder [LINK_TO_QM_DETAILS] is replaced with a link to the QM Views.

Email: Online survey PSWDs for instructor

The administrator sends the PSWDs for an online survey as a PDF file from the survey list or the details of a survey to the instructor. This can be automated via the menu “System Settings/Process Defaults”.

Email: PSWD and PDF for online survey participants (hybrid survey)

Via the survey details of a hybrid survey the administrator sends the PSWDs for the online survey to the participants by activating the option “Send PSWDs by email to respondents”. A personalized questionnaire with the PSWD is attached to the email which the participants can fill in alternatively.

Email: PSWD for online survey participant

In the details of an online survey or via the menu “Scheduled Tasks” PSWDs for the participation in an online survey can be sent to the participants. With the help of the placeholders [PSWD] and [SERVER] or with the placeholder [DIRECT_ONLINE_LINK] the participants get access to the online questionnaire. These place holders may by no means be removed.

Email: Password for online survey participant

In the details of a single password online survey the password can be sent to the participants. With the help of the placeholders [PSWD] and [SERVER] or with the placeholder [DIRECT_ONLINE_LINK] the participants get access to the online questionnaire. These place holders may by no means be removed.

Email: Profile Mail for instructor (system-wide only)

This message can be used to inform new users directly about their new user account. Activate the checkbox “Inform user about profile creation via email” when creating the account. (see chapter B 2.1.2. "Generating and Managing User Accounts")

Email: Profile line (system-wide only)

This email text is used if the report creator sends profile line reports to instructors or other defined recipients via the batch profile lines.

Email: Quality Management Report (system-wide only)

The email is sent if, in the menu “Subunits/QM Report Dispatch” cyclical reports on the results of quality management is set up and activated. A report on quality management is attached in the form of a PDF file.

Email: Regulatory information

A message informing the instructor which deans of studies received a summarized form of the results has been activated (self registering procedure).

Email: Reminder for online participants (Password)

Using the reminder function in the survey list or in the details of a survey as well as in the scheduled tasks (time-controlled online survey), a reminder e-mail is sent to all participants of a Single Password based online survey, regardless of whether they have already participated or not. A direct link to survey participation is sent (placeholder [DIRECT_ONLINE_LINK]).

Email: Reminder for online survey participants (hybrid survey)

With the help of the reminder function in the survey list or in the details of a survey a reminder-email is sent to the participants of a hybrid survey. The PSWD as well as the server address are transmitted (placeholders [PSWD] and [SERVER]). Instead, you can use the placeholder [DIRECT_ONLINE_LINK] for direct access to the online survey. Alternatively, the placeholder [SHORT_PSWD] can be used. In this case, the PSWD is displayed as a 5-digit number and not as a 14-digit number.

Email: Remind online survey participant

With the help of the reminder function in the survey list, in the details of a survey or the scheduled tasks a reminder email is sent to the participants of an online survey. A reminder is only sent to those who have not yet participated. A direct link to the survey participation will be sent (placeholder [DIRECT_ONLINE_LINK]).

Email: Results of a survey

evasys has evaluated a survey just scanned and sends a notification or the administrator sends the report of a survey to the instructor. By default, the PDF report is attached to the email. In addition or alternatively the raw data can be added as an Excel-readable CSV file (see. “evasys Settings/Email Functions & Accounts”).

Email: Results of a survey (Summary) (system-wide only)

This e-mail is released if PDF reports are sent in a collective email to an instructor via the menu Batch Events (“Subunits/Batch Events/Send PDF reports”).

Email: Form/PSWD to the instructor (Instructor's Optional Questions)

The instructor's optional questions for a survey has been completed by the instructor. Now s/he (or the group address) receives an email with the required cover sheet and the questionnaire. The function “evasys Settings/Survey/Instructor's Optional Questions activation status” must be activated.

Letter: Form count below minimum

If the minimum number (as defined under “System Settings/evasys Settings/Survey/ Minimum number of returns for reporting”) of completed questionnaires was not reached for a survey, the evaluation of the survey is suppressed. Via the process defaults or scheduled tasks a notification is sent to the instructor.

2.1.4. Evasys texts

(not Cloud Standard)

evasys: Information text for start page (active instructors)

This text is shown as a welcome and information text on the quick start page of instructor/trainer accounts directly after the instructor/trainer has logged into evasys with his access data.

evasys: Instruction text for PSWD cards

Defines the instruction text on the PSWD cards for online surveys.

evasys: Note on the evasys login page in maintenance mode

This text is displayed for the evasys users on the evasys login page, as long as the administrator has activated maintenance mode (see “System Settings / evasys Settings / Maintenance / Maintenance Mode”).

evasys: Note on the online survey login page in maintenance mode

This text is displayed online respondents on the login page, as long as the administrator has activated maintenance mode (see “System Settings / evasys Settings / Maintenance / Maintenance Mode”).

evasys: Text for Info Center (active instructors)

This text is displayed in the active instructor/trainer account in the menu “Info Center”. Here the administrator can, for example, deposit information on survey processes relevant for his organization.

2.1.5. PDF-report texts

The contents of the PDF report header can also be adapted with the help of text templates. Simple text as well as placeholders can be used. For formatting it is possible to use HTML tags.

PDF-report: Format of the instructor name

Here the display of the instructor's name can be adapted. This setting has impact on the header of all profile lines as well as on the header of the presentation form.

PDF-report: Header

In the text field the header contents is defined by HTML formatting and placeholders. The example shown here generates the following PDF report header:

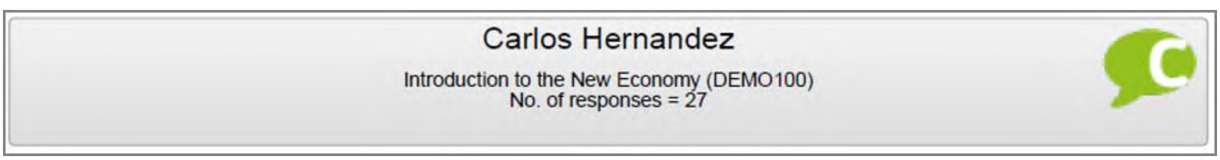


Figure 769: Sample PDF Report Header

Example:
You could, for example, insert a line containing the static text “Result of student survey” (in the example in font size 8):

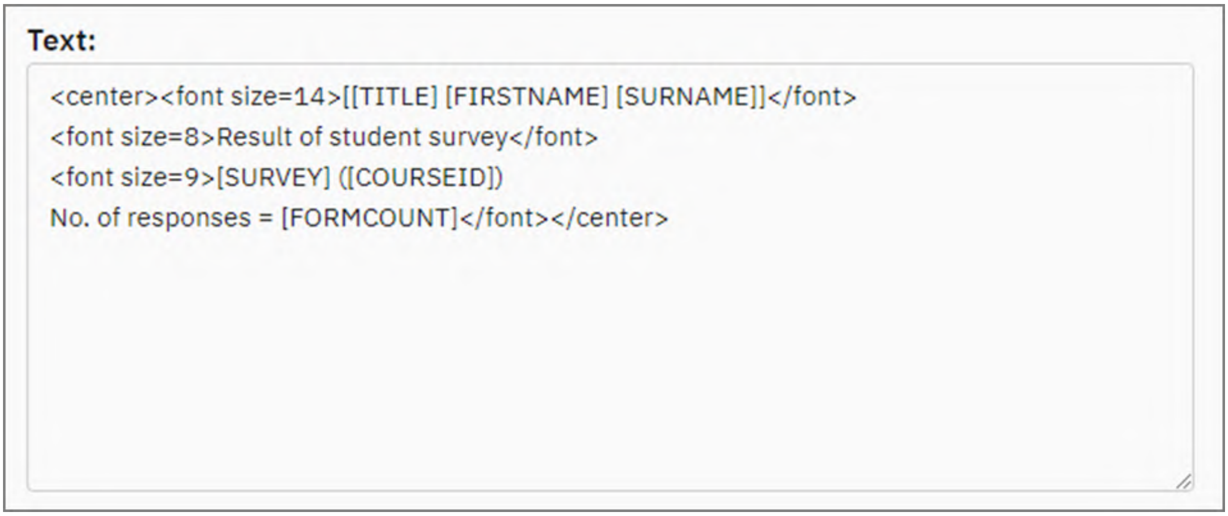


Figure 770: Modifying the Text Template by Inserting a Line

After a click on [Save] you will see upon re-opening of the report that the PDF report header has changed as follows:

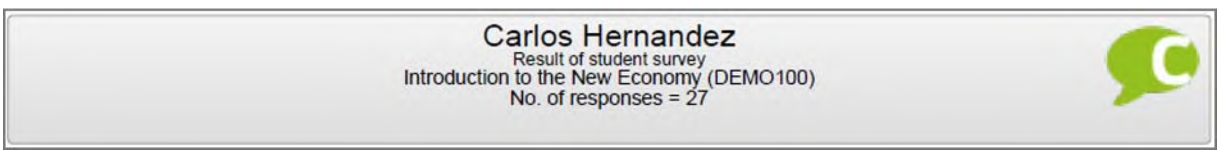


Figure 771: Result after Modifying the Text Template by Inserting a Line

Of course, other placeholders can also be used.

In the following you will find a listing of the available formatting:

Type	Tag	Example	Layout	Please note:
Bold		Bold	**Bold**	
Italic	<i>	<i>Italic</i>	*Italic*	
Underlined	<u>	<u>Underlined</u>	Underlined	
Centered	<center>	<center>Centered</ center>	Centered	
Font size	<font size=xx>	<font size=14>Font size 14	Font size 12	Maximum 50, Minimum 1; No single or double quotes

Table 30: List of available formatting

PDF-report: Report Header (Report Creator)

For the PDF report of the report creator his a special report header can be created which is independent of the one of the instructor.

PDF-report: Header line (upper right corner)

The text is displayed in the top right corner of every side of the PDF report.

PDF-report: Header line (upper right corner) (Report Creator)

The text is displayed in the top right corner of every side of the PDF report which is created by the report creator.

PDF-report: Text for too low response

If the option “Data privacy: Show notice for suppressed report” under “System Settings/Report Settings/Configuration” is activated, this text appears instead of the graphic for scaled questions and open questions.

PDF-report: Text for too low response (profile line)

If the option “Data privacy: Show notice for suppressed report” under “System Settings/Report Settings/Configuration” is activated, this text appears instead of the relevant data point in the profile line of the PDF report.

2.1.6. Norm PDF-report texts

Norming PDF report: Introduction

This text template defines an additional introduction text for the recommendation document to the norming. It requires the same preconditions as the text template “Norming PDF report: Letter”.

Norming PDF report: Letter

If norming has been set for a questionnaire in the questionnaire details, a link to a recommendation document can be displayed under the normed profile line provided that the option “Show recommendation text” is activated in the configuration of the PDF report.

This text template defines the text of the letter for the recommendation document.

2.1.7. Certificate of participation

Certificate of participation for online surveys (PDF)

If a participation certificate for participation in online surveys is activated in the questionnaire details in form of a PDF document, this text is used for the document.

> **Note:**
> The PDF can only be generated when a PDF template has been assigned to this text type.

Certificate of participation for online surveys (email)

The dispatch of a certificate of participation by email to the participants is activated in the details of a questionnaire.The PSWD was sent to the participant by email. The participant has just voted for the survey and now receives an email with a certificate of participation.

2.1.8. Placeholders for Text Templates and Questionnaires

Placeholders can be used in evasys both in the questionnaire header of a questionnaire and in text templates. The following list shows all available placeholders for text presentations (email texts, PDF letters) and questionnaires

Note:
Placeholders can also be used in the question text. However, this is only possible in online surveys or on forms created in VividForms Designer.

Placeholder	Content	Text Template	Question-naire
[ADDRESS]	User's address	X	
[AUTHOR]	Titel, first and last name of the instructor		X
[AUTHORS]	Title, first and last name of the instructor and all secondary instructors	X	X
[CALCULATED_RESPONSE_RATE]	Response rate calculated for the response rate message in the “Scheduled Tasks”	X	
[CORRECTION]	Instruction for correcting check marks on the questionnaire		X (only Editor)
[COURSEENROLLMENT]	Number of course participants: To use the placeholder, a value must be defined at the course/ topic. This also applies if the email addresses of the participants are deposited manually into the field in the time control menu.	X	
[COURSEID]	Course identification	X	X
[COURSENAME]	Course name	X	X
[COURSEROOM]	Course's room/location	X	X
[COURSETYPE]	Course type	X	
[CURRENTDATE]	Current date	X	X
[CUSTOMFIELD_X]	Course's user-defined fields (X=1 bis 20)	X	X
[DEFINED_SLA]	Only valid for QM Notification: Defined Quality index, i.e., 65%	X	
[DIMENSIONS]	Name of the dimensions/question groups	X	
[DIRECT_HTML_REPORT_LINK]	Adds a link to the HTML report of a survey. Can be used in the text template “Results of a survey”.	X	
[DIRECT_ONLINE_LINK]	Adds a link to the online survey that contains the server address as well as the PSWD/password. Simply clicking the link shows the online questionnaire.	X	X (only Hybrid)
[DISTRIBUTED_PSWD_COUNT]	Number of PSWDs dispatched	X	
[DISTRIBUTED_RESPONSE_RATE]	Percental response rate on the basis of the dispatched PSWDs	X	
[ENROLLMENT_RESPONSE_RATE]	Percental response on the basis of the study course participants	X	

Placeholder	Content	Text Template	Question-naire
[EXCEEDED_OR_FALLEN_BELOW]	Only valid for QM Notification: Text "Exceeded" or "Fallen below"	X	
[FIRSTNAME]	First name	X	
[FORMCOUNT_SOURCE_M]	Number of returns online (mobile)	X	
[FORMCOUNT_SOURCE_O]	Number of returns online (PC)	X	
[FORMCOUNT_SOURCE_OM]	Number of returns online (mobile & PC)	X	
[FORMCOUNT_SOURCE_P]	Number of returns paper	X	
[FORMCOUNT]	Number of returns for survey	X	
[GENDER]	Gender (male or female)	X	
[GROUP]	Group of a topic		
[LASTCAPTUREDATE]	Last capture date paper = Scan date, Online = last return)	X	
[LINK_TO_QM_DETAILS]	Only valid for QM notification: Link to the QM views of a specific survey	X	
[MARK]	Instruction how to fill in the questionnaire		X (only Edi-tor)
[MINFORMCOUNT]	Minimum number of returns in module surveys	X	
[ORGANIZATION]	Name of the organization		X
[OVERALL_RESPONSE_RATE]	Percental response rate on the basis of the total existing PSWDs	X	
[PARTICIPANT_ADRESS]	Only valid for non-anonymous survey: Address of a participant	X	X
[PARTICIPANT_CUSTOMX]	Only valid for non-anonymous survey: User-defined field of a participant (X = 1-20)	X	X
[PARTICIPANT_EMAIL]	Only valid for non-anonymous surveys: Email address of a participant (e.g. user_05@example.com)	X	X
[PARTICIPANT_FIRSTNAME]	Only valid for non-anonymous surveys: First name of a participant	X	X
[PARTICIPANT_IDENTIFIER]	Only valid for non-anonymous surveys: Participant ID	X	X
[PARTICIPANT_LASTNAME]	Only valid for non-anonymous surveys: Last name of a participant	X	X
[PARTICIPANT_SALUTATION]	Only valid for non-anonymous surveys: Salutation of a participant	X	X
[PARTICIPANT_SALUTATION2]	Only valid for non-anonymous surveys: Complete address of the participant including salutation	X	X
[PARTICIPANT_TITLE]	Only valid for non-anonymous surveys: Title of a participant	X	X
[PERIOD_NAME]	Name of the Survey Period	X	X
[PERIOD]	Name of the Survey Period		X
[PROGRAMOFSTUDY]	Course's program of studies	X	X

Placeholder	Content	Text Template	Question-naire
[PROJECTNAME]	*Project name*	X	
[PSWD]	A PSWD for online survey participants (e.g. X5FU3)	X	X (Hybrid)
[PSWD_COUNT]	Number of all PSWDs	X	
[QR-CODE]	QR-Code for online surveys	X	X
[QUESTIONARY]	Name of the questionnaire	X	X
[RESPONSERATE_WARNING_VALUE]	Number of responses below which a message is sent to the instructor via the “Scheduled Tasks”	X	
[SALUTATION]	Form of Address (e.g. “Dear Mr.” or “Dear Ms.”)	X	
[SEC_SALUTATION_X]	Form of Address (e.g. “Dear Mr.” or “Dear Ms.”) of secondary instructor (X must be an integer)	X	
[SEC_FIRSTNAME_X]	First name of secondary instructor (X must be an integer)	X	X
[SEC_SURNAME_X]	Surname of secondary instructor (X must be an integer)	X	X
[SEC_TITLE_X]	Title of secondary instructor (X must be an integer)	X	X
[SERVER_DIR]	User entry point(e.g. http://evasys.demo-university.com)		
[SHORT_PSWD]	Instead of a 14-digit PSWD, a 5-digit PSWD is used	X	X (Hybrid)
[SERVER]	URL for online survey participants(e.g. http://evasys.example.com/evasys/online/)	X	X (Hybrid)
[SUBUNIT]	Name of subunit	X	X
[SURNAME]	Surname	X	
[SURVEY_LIST]	List of all surveys (important when sending the PDF reports collected in one email - batch events)	X	
[SURVEY_QUALITYINDEX]	Overall quality of a survey as stated in the QM-Views (e.g. 77%)	X	
[SURVEY]	Name of survey	X	X
[SURVEYCREATIONDATE]	Date of survey creation	X	
[TASK_SURVEY_CLOSE_DATE]	Date on which the survey is closed by the “Scheduled Tasks”	X	
[TASK_SURVEY_START_DATE]	Date on which the survey is started by „Scheduled Task“ and PsWDs are send out		
[TASK_SURVEY_REMIND_DATE]	Date on which a reminder is send to the participants by „Scheduled Tasks“		
[TASK_SURVEY_RESPONSE_ NOTIFICATION_DATE]	Date on which a notification is send to the instructor, regarding the current return rate		

Placeholder	Content	Text Template	Question-naire
[TIMESTAMP]	Time of submission of an online survey (e.g. 22:15:34 15.03.2011)	X	
[TITLE]	Title	X	
[TOPICENROLLMENT]	Number of topic participants	X	X
[TOPICID]	Topic identification	X	X
[TOPICNAME]	Topic name	X	X
[TOPICROOM]	Topic‘s room/location	X	X
[TOPICTYPE]	Topic type	X	X
[UNIT_NAME]	Only valid for module evaluation: Name of the module	X	

Table 31: Placeholder for Text Templates and Questionnaires

Hint:

If more than one placeholder is used in a row, they should be enclosed in additional square brackets (i.e. [[SALUTATION] [TITLE] [SURNAME]]).

In this way, it can be avoided that a superfluous space is displayed in case a place-holder cannot be filled.

2.1.9. HTML Format for Email Texts

Emails are sent as pure text messages per default. If desired, they can be sent in HTML format. For this, the option, “Emails in HTML Format” in the “Email Functions & Accounts” section of the system configuration, must be activated.

If this option is activated, at all points in the system in which emails can be created, an HTML editor is activated, which supports formatting, adapting of color and text align-ment and inserting elements such as links or images.

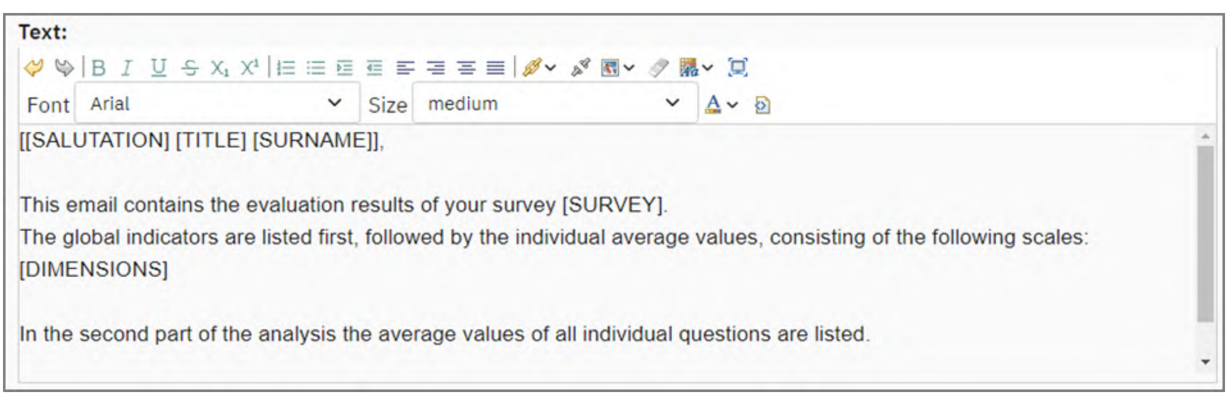


Figure 772: HTML-Editor

If this option is deactivated in the system settings, the editor is shown, but is gray and inactive.

In the following example, font, color, and display have been adapted using the HTML editor:

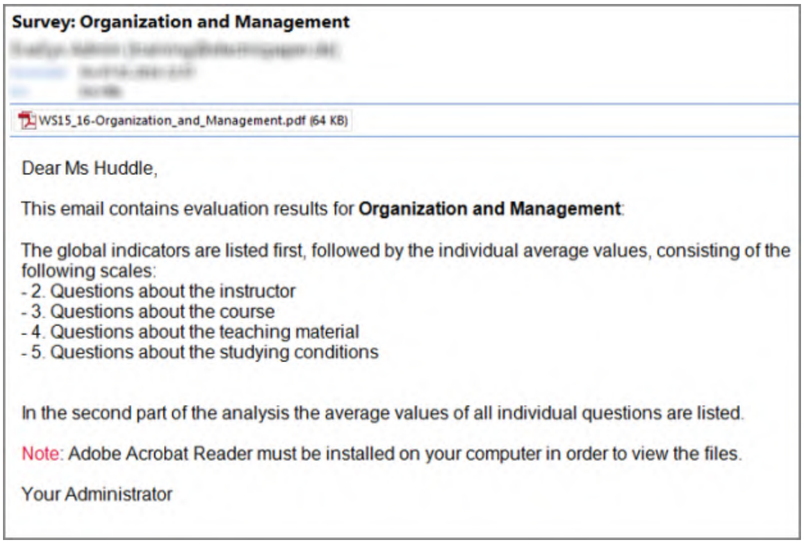


Figure 773: HTML-E-Mail

2.2. Documents

Documents can be saved in evasys for a number of purposes. As documents for attachments to emails created in evasys or as documents for PDF letters.

The administration of documents and files is done centrally in the menu item “documents“. The following functions are available:

- Uploading files to the evasys server
- Displaying documents
- Updating documents
- Deleting documents from the evasys server

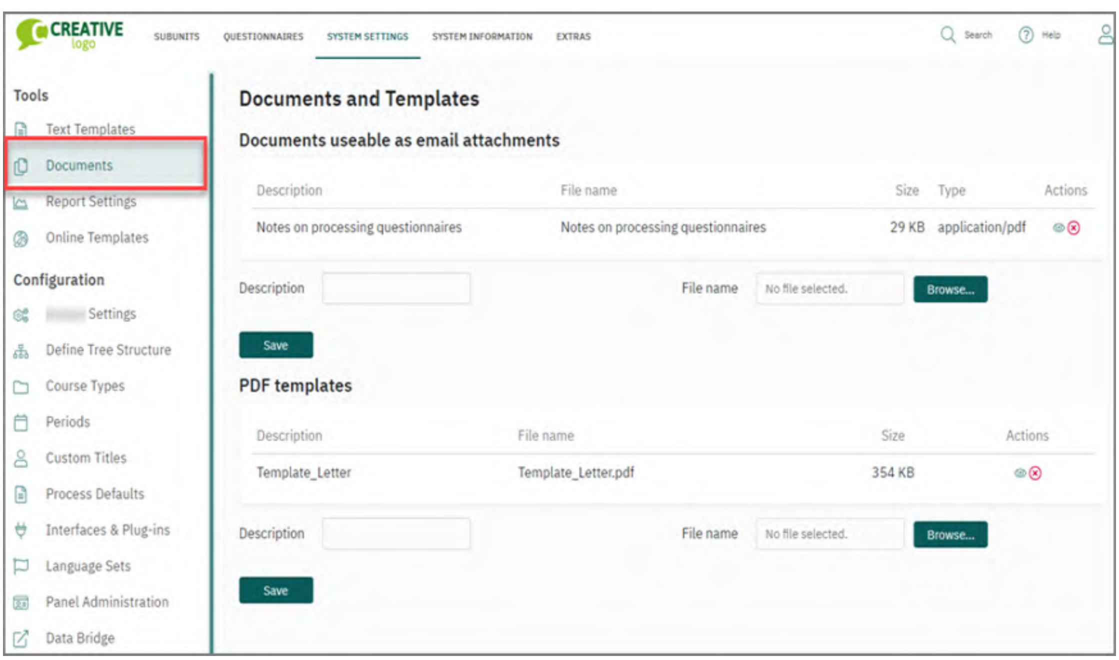


Figure 774: Document Administration

The secure storage of documents in the evasys database means that they will be there when you need them, e.g. email delivery.

Uploading documents

Please enter the following information in order to upload documents:

Description– Description of the document

File name – path to the document on your local system

With a click on [Save] you can upload the document to the server.

In the table you can now see more information about the document (columns 3+4):

Size – Size of the uploaded document in bytes

Type – File type of the document (mime type)

Note:
You cannot upload documents of the following file types which are classified as potentially dangerous:

['EXE','PIF','APPLICATION','GADGET','MSI','MSP','COM','SCR','HTA','CPL','MSC','JAR','BAT','CMD','VB','VBS','VBE','JS','JSE','WS','WSF','WSC','WSH','PS1','PS1XML','PS2','PS2XML','PSC1','PSC2','MSH','MSH1','MSH2','MSHXML','MSH1XML','MSH2XML','SCF','LNK','INF','REG']

Updating documents

Changes to documents must be first be done locally (on a workplace computer). Then upload the modified document again to the server .

Displaying documents

Display documents by clicking on the icon in the next to last column. You will need to have the appropriate application software (e.g. Microsoft Office for DOC files).

Deleting documents

Delete documents from the system by clicking on the icon in the next to last column. All links to email types or to PDF report types are also deleted.

The size of the document is limited to 1 megabyte. You can change the maximum size in the evasys settings (“evasys Settings/General/Maximum Size of Document”).

2.2.1. Email Attachments

Every email type in evasys (e.g. Send PSWD to respondent” or “Send report to instructor”) can be provided with its own email attachment. For example, an instructor could receive along with his PDF report a document with the evaluation requirements.

Under the heading “Documents for Email Attachments” you can find all related files.

Email attachments can be created in any file type, so please remember that recipients may have trouble opening uncommon file formats.

More about assigning documents to specific email types can be found in the section “Text Templates”.

2.2.2. PDF Templates

Customized letter templates (PDF templates) can be entered for the various PDF report types (e.g. “Report to Instructor” or “Summary Report to Dean”).

The template layouts can be designed so that they meet any corporate identity requirements. As the name says, the templates must be in PDF format or converted into this format.

The templates in evasys are filled with data from the evasys system when the reports are generated. In order to do this certain fields are necessary on the PDF. A full version of Adobe Acrobat (V5.0 and higher) is necessary to create the fields in PDF.

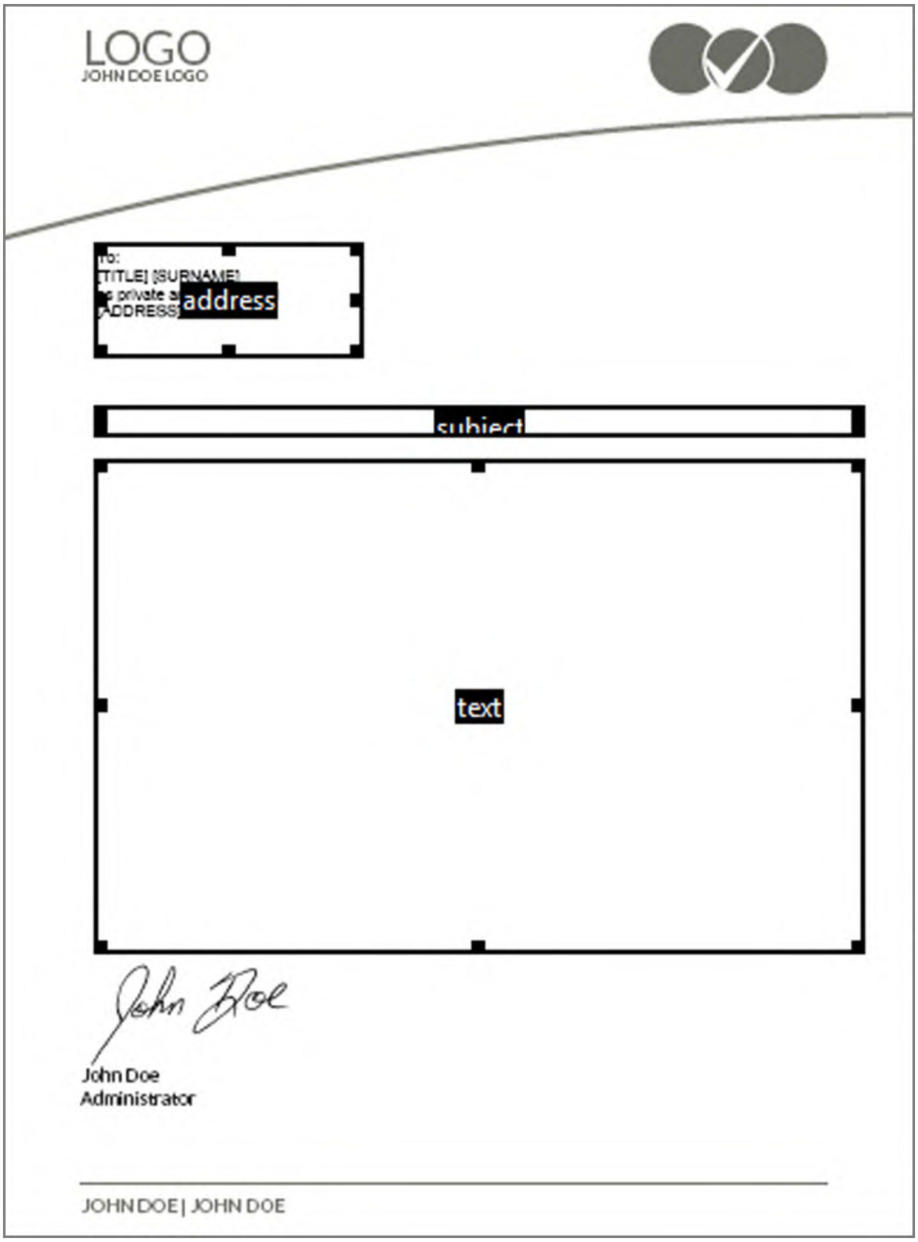


Figure 775: PDF Template: Acrobat Professional View

Schematic layout of template:

A letter template is made up of a static part (logo, sender, other text) an a dynamic part, which is filled out by evasys depending on the report. For the dynamic part there are three different fields available:

address

This field is filled with data about the instructor (e.g. name, address, etc.). A placeholder determines which data appears. The types of placeholders are described in Section 2.1.3 Template for letter in PDF reports. In Adobe Acrobat placeholders are defined in the text field at [Options/Default Value].

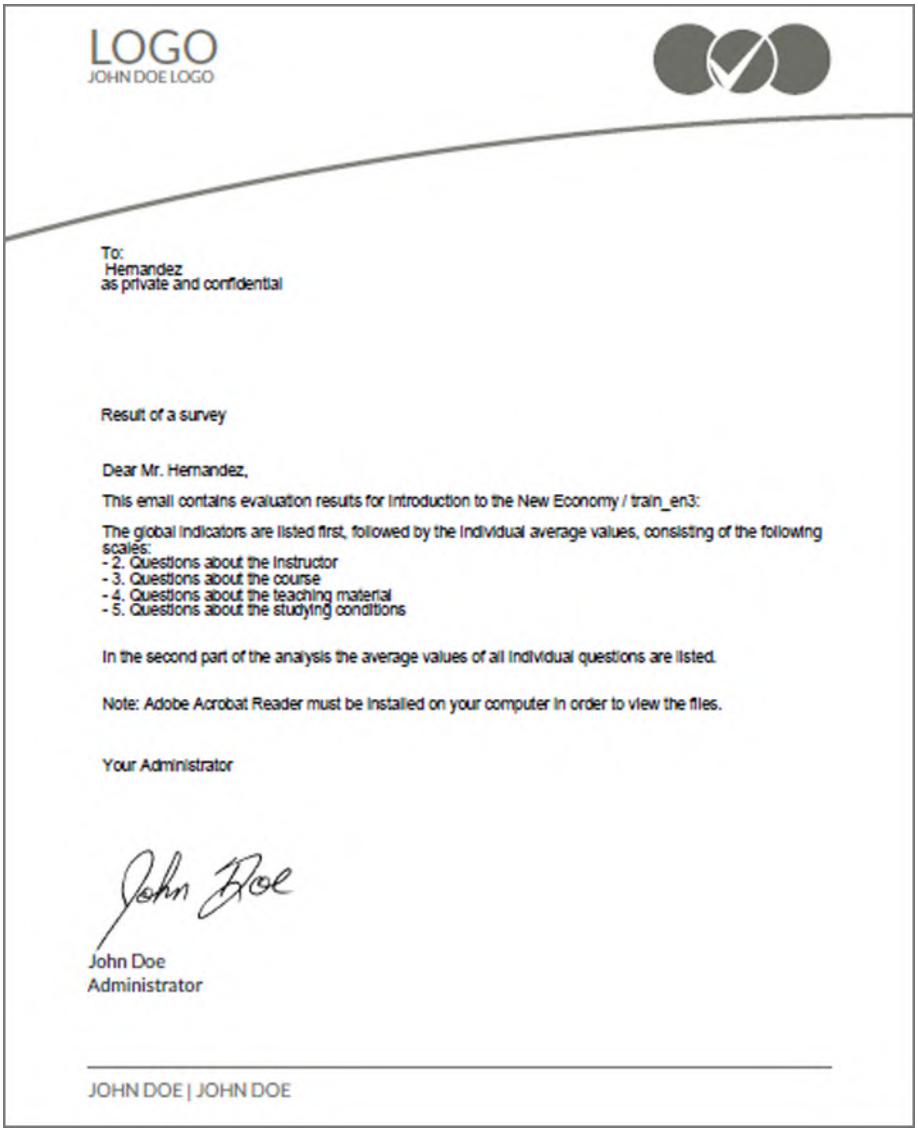
For example:

To:

[GENDER]

[TITLE] [FIRSTNAME] [SURNAME]

confidential



LOGO
JOHN DOE LOGO

To:
Hernandez
as private and confidential

Result of a survey

Dear Mr. Hernandez,

This email contains evaluation results for Introduction to the New Economy / train_en3:

The global indicators are listed first, followed by the individual average values, consisting of the following scales:
- 2. Questions about the instructor
- 3. Questions about the course
- 4. Questions about the teaching material
- 5. Questions about the studying conditions

In the second part of the analysis the average values of all individual questions are listed.

Note: Adobe Acrobat Reader must be installed on your computer in order to view the files.

Your Administrator

John Doe
Administrator

JOHN DOE | JOHN DOE

Figure 776: Example of PDF Template

subject

This field is filled with a heading or the subject line of the letter. The subject line can be defined in the evasys menu item [Text Template].

text

This field contains the personalized text of the letter for the PDF report. The text can be defined in the evasys menu item [Text Template].

In Adobe Acrobat the templates must be saved by [Save As] so that the internal PDF structure is clean.

2.3. Process Defaults

In the menu “System Settings”/ “Process Defaults” you can set the defaults for the configuration of user accounts. The configuration of evasys user accounts allows you to customize the surveys to your requirements. The following options are available:

2.3.1. Special Settings for Active Instructor Accounts

Automatically send email with cover sheet/questionnaire/PSWDs on survey creation?

This option sends the cover sheet or personalized form for your new survey immediately after creation of the survey to the email addresses given in the profile of the project manager.

Personal utilization statistics visible for other instructors? (This does not include any result data, see utilization statistics)

The information shown in the utilization statistics concerning the utilization of the system (number of scanned questionnaires, number of surveys etc.) can also be seen by other instructors, provided that the administrator permits it. The administrator can see the statistics of utilization in any case.

2.3.2. General Settings for Paper Surveys

Automatically send a message or the report by email after the survey has been analyzed (paper surveys only).

After scanning forms or after an online survey has been closed an email with the PDF report can be automatically sent. The email is sent to the email address given in the profile of the instructor. If the email may not contain the report or if it, in addition, should contain the CSV raw data, this can be set in the system settings under “System Settings/evasys Settings/Email Functions & Accounts” (option “Attach PDF report” or “Attach CSV file”)

Close survey after first scan process? (Closed surveys block further data.)

Surveys can be highlighted as either “ended” or “not yet ended”. This function allows you to collect data in a number of scanning operations in different periods of time (e.g. when returns come in “waves”). If you are sure that you will not need further scanning operations after the first scanning operation then you can answer this question with “yes”.

2.4. Interfaces

(not Cloud Standard)

Under “System Settings / Configuration / Interfaces & Plug-ins” you will find the configuration of different authentication options and interfaces. The menu is divided into different tabs:

- Plug-ins
- Web Service Settings
- LDAP Settings
- Single Sign-on Settings (SSO)
- LTI® - Interface
- Integration Hub Settings
- Integration evasys+

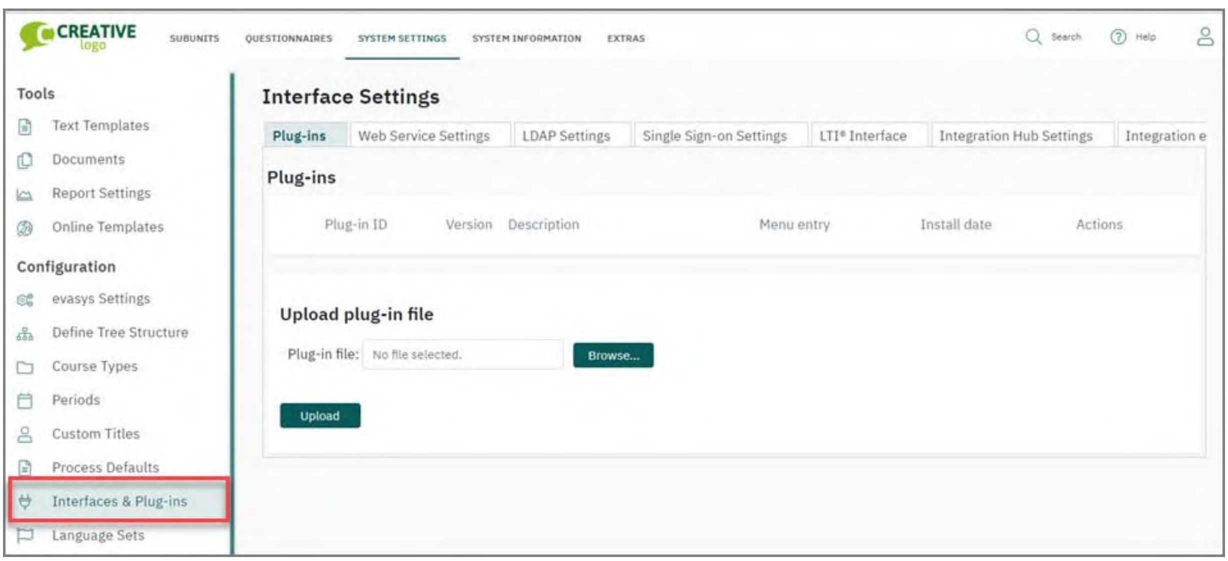


Figure 777: Menu Interfaces & Plug-ins

2.4.1. Plug-ins

With the help of the plug-in interface, extensions for evasys can simply be installed and configured via the user interface without the enlistment of IT-specialists. The plug-ins can extend existing functions as well as contain entirely independent desktops or analysis report types.

You can create your own plug-ins or select from a range of free plug-ins provided by your manufacturer.

In the tab Plug-ins you can configure optional additional plug-ins. You will find information on each plug-in and have the option to enable/disable or delete the plug-in.

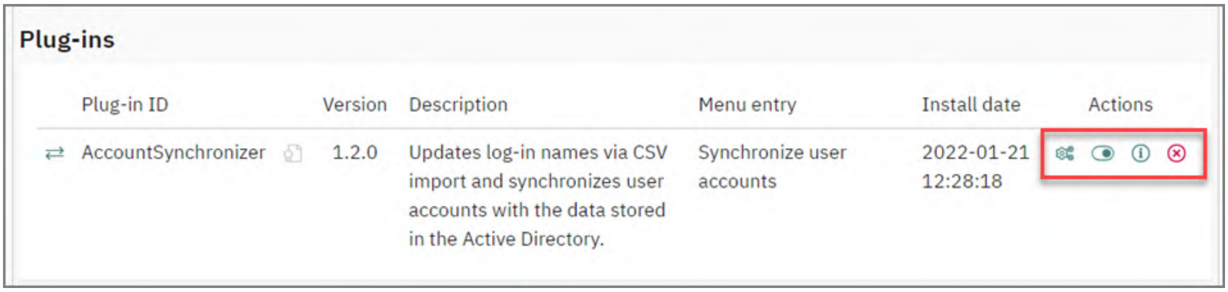


Figure 778: Plug-ins tab

If there is a green certificate symbol to the left of the plug-in entry in the list, the plug-in is certified by evasys GmbH. Under "Actions" you can select the following functions:

Configure Plug-in

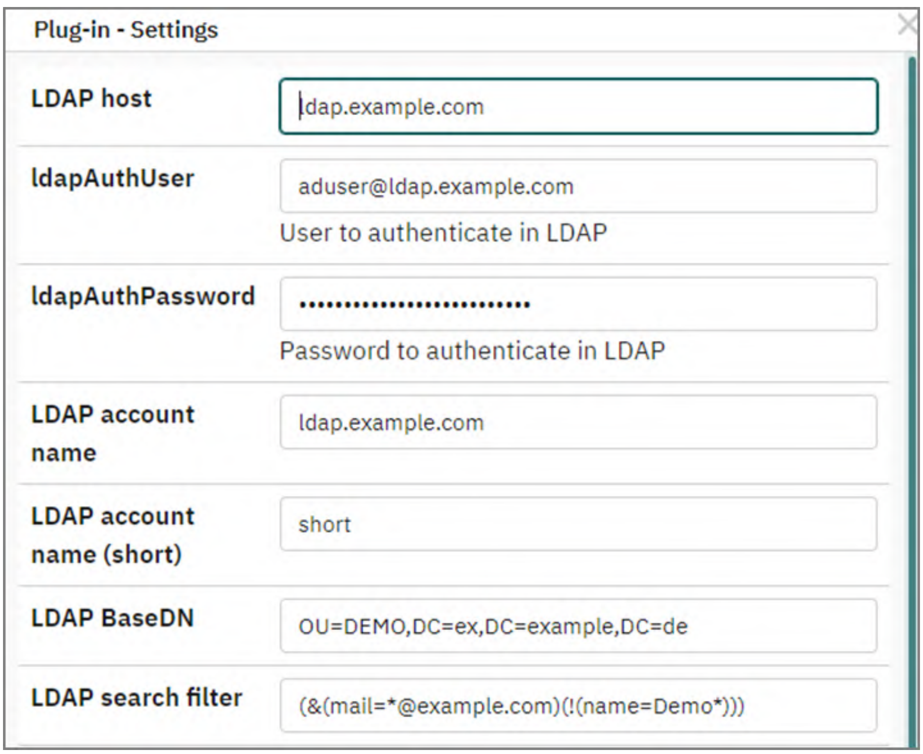


Figure 779: Configure Plug-in

The settings above are just an example. The exact configuration possibilities arise from the respective plug-in and its functions. Please consult the respective documentation of the plug-in.

Enable/disable Plug-in

With the small slide control the plug-in can be enabled and disabled system-wide.

Information about the Plug-in

By clicking on the blue "i" icon a window with detailed information about the plug-in, in particular about the author, version and installation date as well as a link to a documentation, if available, is shown.

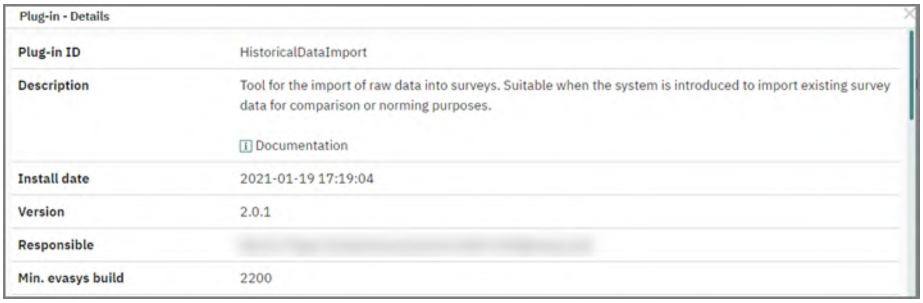


Figure 780: Plug-in Details

Upload Plug-ins

Below the list of installed plug-ins, there is the possibility to upload new plug-ins in evasys.

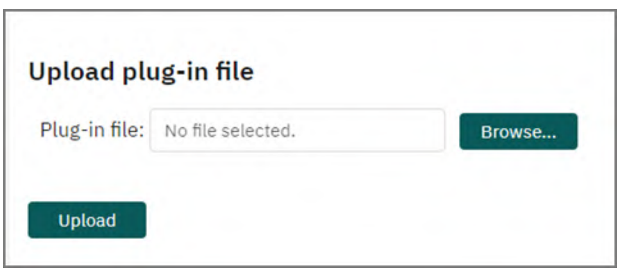


Figure 781: Upload Plug-in

The plug-in to be installed is uploaded as a zip file. Please refer to the accompanying documentation before uploading the plug-in

Note:
Often the uploaded ZIP archive is contained within a ZIP archive. So firmly check the archive. You may find there a "readme" file with details of how to install.

2.4.2. Web Service Settings

The configuration area “Web Service Settings”, which can be found in the main menu “System Settings/ Interfaces & Plug-ins”, allows the administration of external web servers that communicate with the evasys server via the web services evasys SOAP-API.

By the so-called web services, web servers can communicate with one another and download the other system's functionalities. This way, it is possible to integrate evasys into existing web software systems. Typical applications are, for example, the automated update of the user accounts and survey procedures, the download of evaluation reports or questionnaire supplies.

Figure 782: Web Service Settings

Detailed information about the web service interface can be found in the evasys Technical Guide.

2.4.3. LDAP Settings

Under "LDAP Settings" you configure the connection to an LDAP server or Active Directory server on the Lightweight Directory Access Protocol. This allows users to log in to evasys using their central organization password.

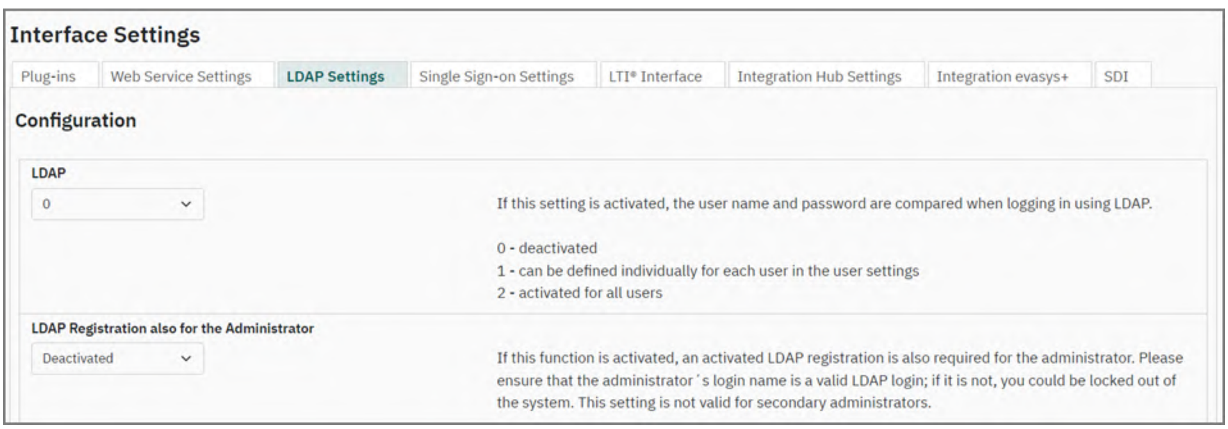


Figure 783: LDAP Settings

For further information please consult the evasysTechnical Guide.

2.4.4. Single Sign-on Settings (SSO)

Single Sign-on can be used in evasys to log in to the system with verified (SSO) accounts, as used elsewhere in your organization. There are two possibilities to use this authentication scheme:

- Local Identity Providers (IDP):

  If authentication through SSO is done directly in your customer's own organization (for example, through Microsoft ADFS), please contact our support team. We will assist you in setting up this feature.

- Logon via federations:

  In addition to integrating your own identity providers, it is also possible to use SSO within federations. With this SSO procedure, users can log in to evasys with the user login data with which they are registered at their home institution (usually user name and password) (authentication) and - provided they have the appropriate authorization - use the evasys system. Universities and organizations that are, for instance, members of eduGAIN or the UK Federation can use the SSO component for uncomplicated and simple user login in evasys. If required, we can additionally register for local federation services in your country. Just give us a note which federations are relevant to you.

For detailed information please refer to the technical manual.

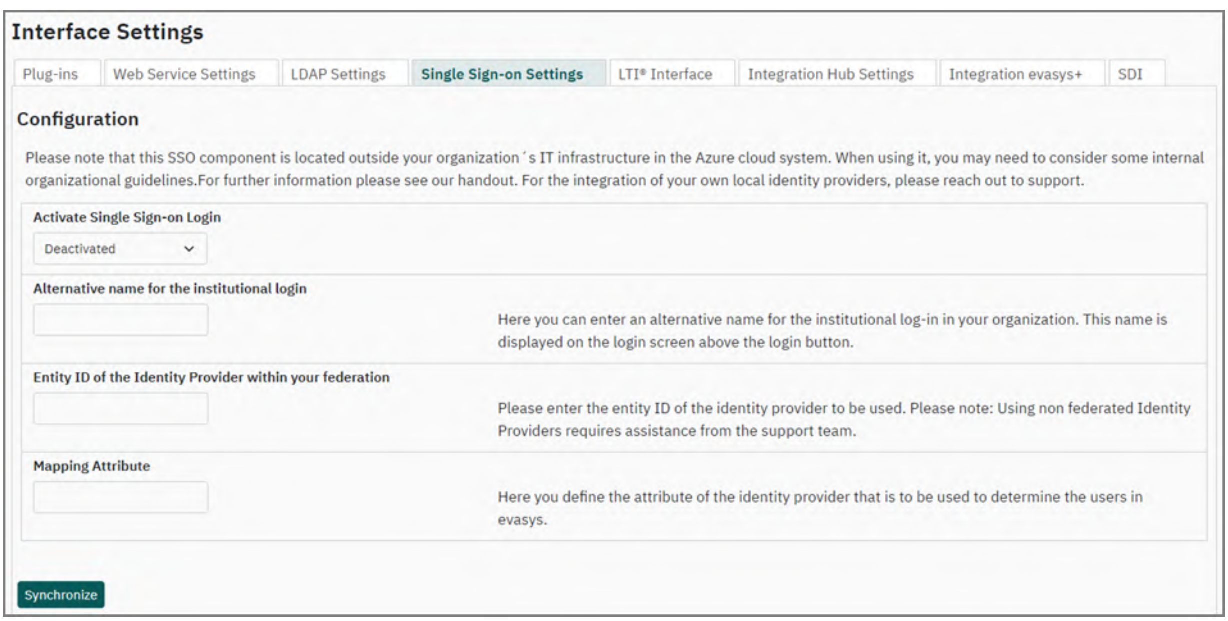


Figure 784: Single Sign-on Settings

2.4.5. LTI® - Interface

With the LTI®-interface, learning management systems (LMS) such as Moodle can be connected to evasys. Your evasys can show information at various levels in your LMS. Thus, you can for example display links to online surveys with further additional information in the student view. In the lecturer view, information can be on the status and response rates of the current surveys can be displayed.

In the following figure you can see an example of the integration of online surveys into the LMS. The participant can access his/her online surveys directly in his/her LMS account.

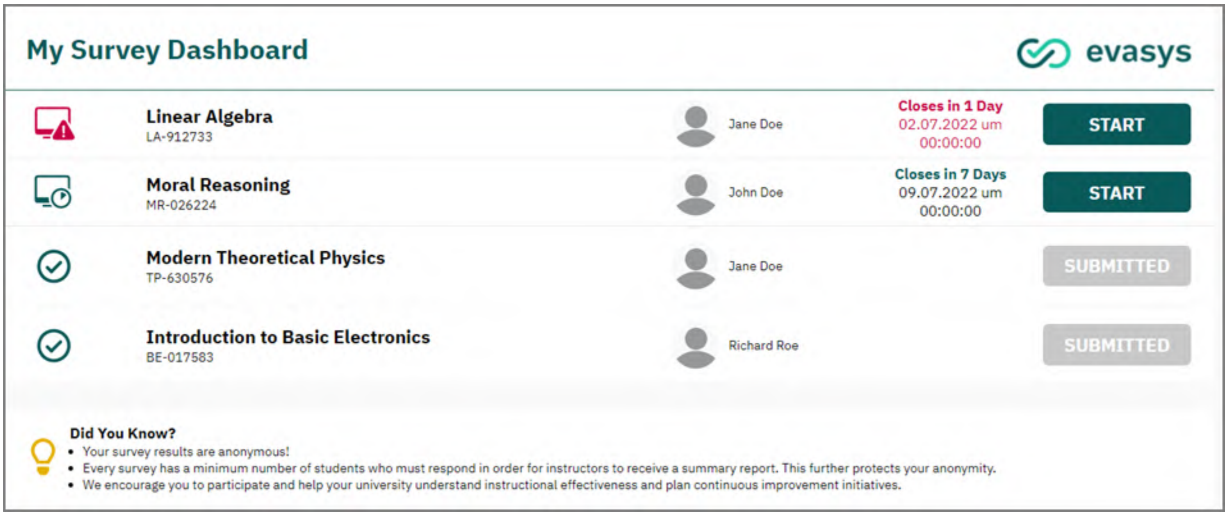


Figure 785: LMS integration participants

The following figure shows the corresponding example of the instructor view:

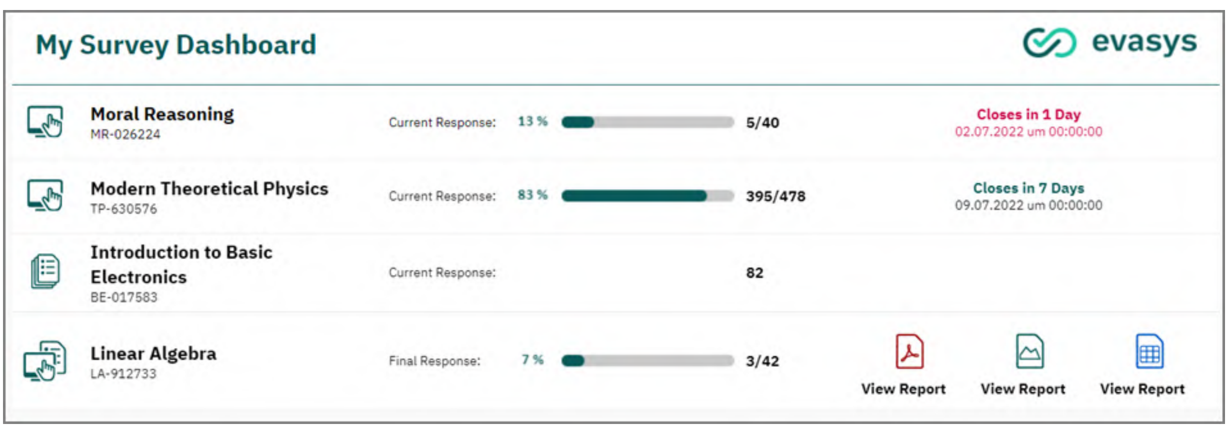


Figure 786: LMS integration: Recall reports

We offer a special Moodle plug-in which allows you to place the evasys surveys directly on the start page using a Moodle block.

If licensed, the LTI® interface can be activated and configured in the menu “System Settings/ Interfaces & Plug-ins / LTI® Interface“. For detailed information, please consult the evasysTechnical Guide.

2.4.6. Integration Hub Settings

With the help of the Integration Hub, learning management systems such as Canvas or MyDay can be connected to evasys and configured without having to install separate plug-ins in the respective system.

This way, additional features can be added to the LMS integrations which go beyond the functionalities of the mere LTI interface. For example, in addition to displaying the online survey links in the student portals, you can also set calendar entries for the evaluation or create surveys as tasks in Canvas.

For detailed information, please consult the evasysTechnical Guide. Please note that the Integration Hub requires additional licensing.

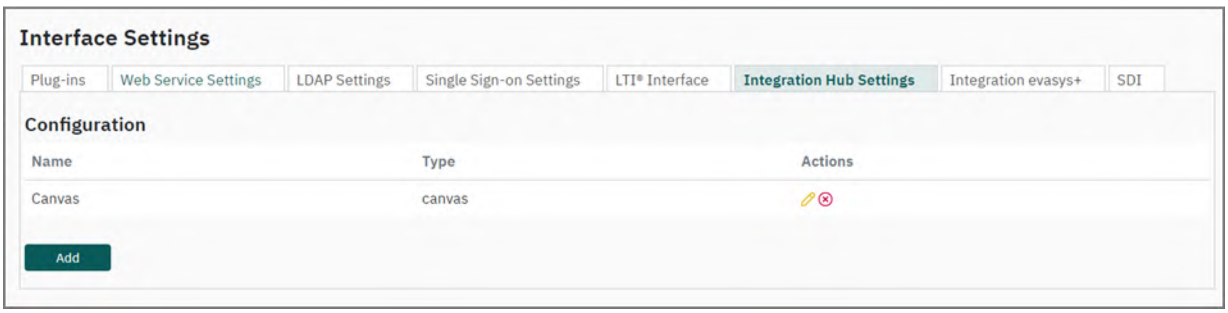


Figure 787: Integration Hub Settings

2.4.7. Integration evasys+

Evasys + is a cloud-based platform integrated in evasys, which combines a number of helpful applications and functions under one roof.

The evasys + admin portal supports you at the administrative level in organizing and carrying out your central surveys. It offers numerous filter, view and search options, with the help of which you can get a good overview of your data and at the same time implement various actions and workflows.

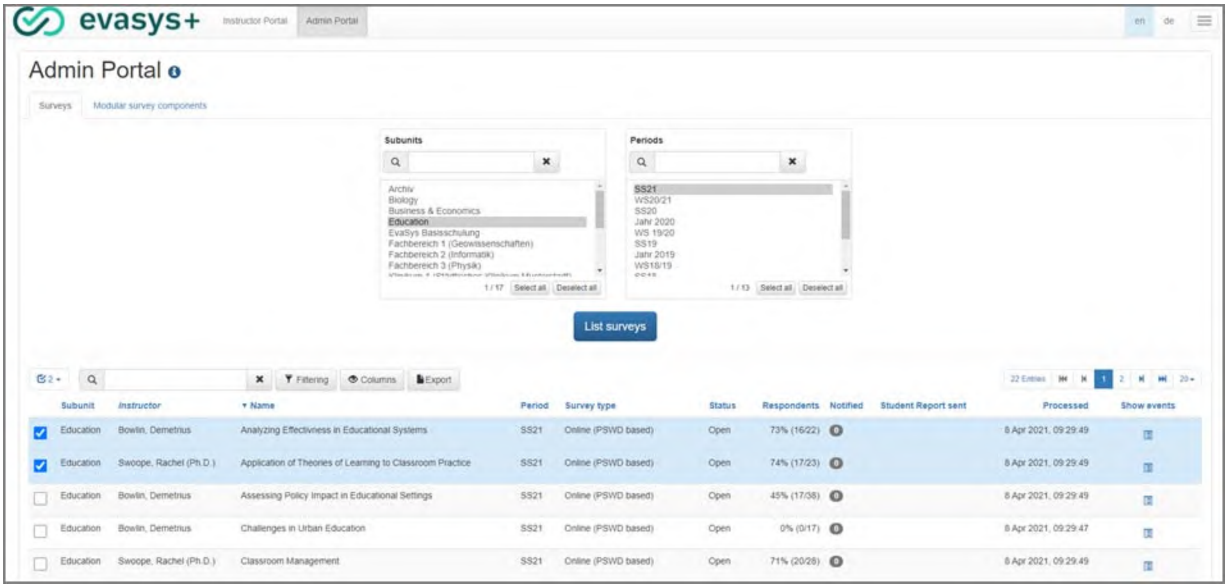


Figure 788: evasys+ Admin Portal

With the help of the evasys + instructor portal, teachers and students can be more closely involved in the survey as part of a "closing-the-loop" approach and encouraged to actively deal with the survey results.

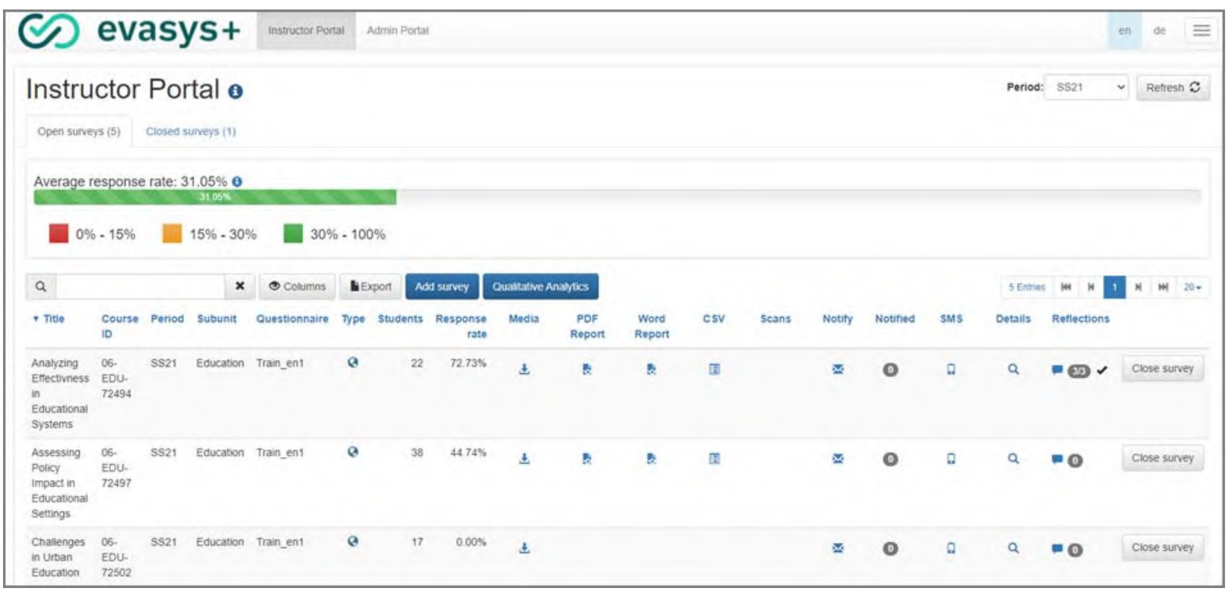


Figure 789: evasys+ Instructor Portal

You can connect your evasys+ to your evasys system quickly and easily with a mouse click in the "Integration evasys +" menu. You will find more detailed information on this in the evasys technical guide. Please note that evasys+ requires additional licensing.

2.5. Evasys Settings: Configuration

(partly available in Cloud Standard)

At the menu “System Settings/evasys Settings” in the administrator interface you have access to the configuration of the evasys server.

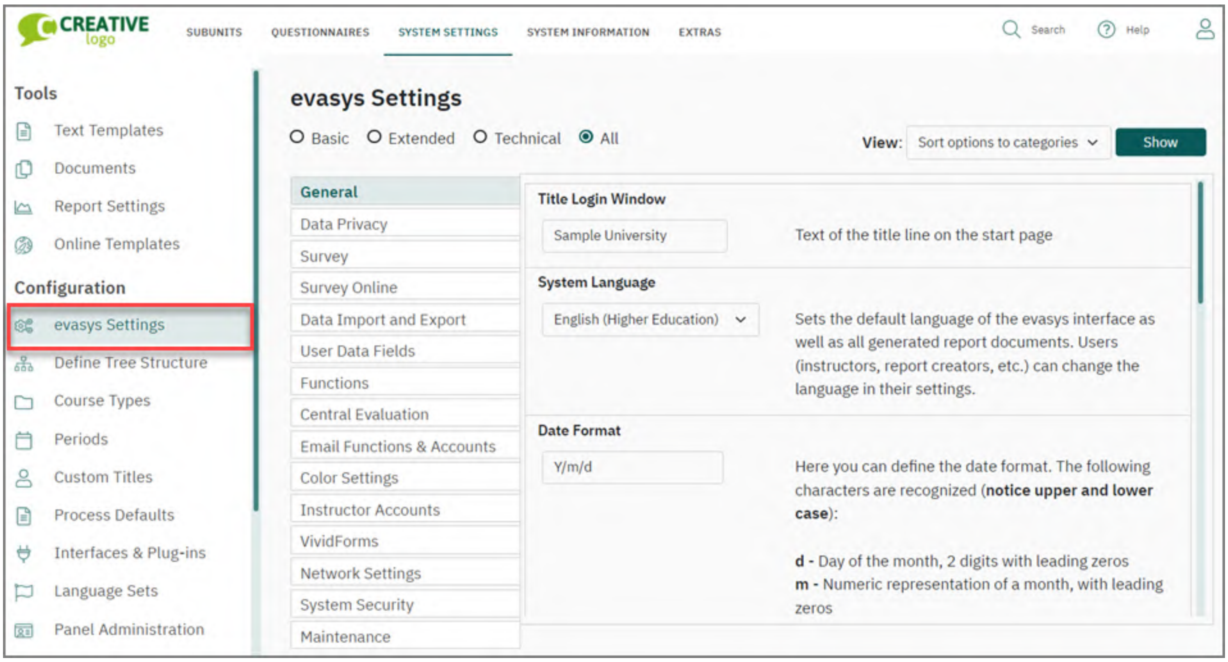


Figure 790: evasys Settings

The settings menu is divided thematically into tabs. At first, only the basic settings, i.e. the most important settings for evasys use, are displayed. By selecting "Extended" in the menu header, additional switches that are used less frequently can be displayed. The selection "Technics" shows all switches required for the technical configuration of the evasys system. Usually, the technical configuration takes place during the installation and commissioning of the system. These switches are of particular interest for your IT in the event of technical changes in your system environment. The "All" button displays all switches.

Figure 791: Show Switches in the Setting

Using the view options on the right side, the settings can be displayed in a long list below each other, or only the settings which have been added in a certain evasys version. A click on the tabs on the left side of the menu opens the settings for the following categories:

- General
- Data Privacy
- Survey
- Survey Online
- Data Import and Export
- User Data Fields
- Functions
- Central Evaluation
- Email Functions & Accounts
- Instructor Accounts
- VividForms
- Network Settings
- System Security
- Maintenance

Many of the available configuration options are characterized and marked by gray text "Make this option subunit available to subunit administrators", meaning that they can be activated for the use by subunit administrators:

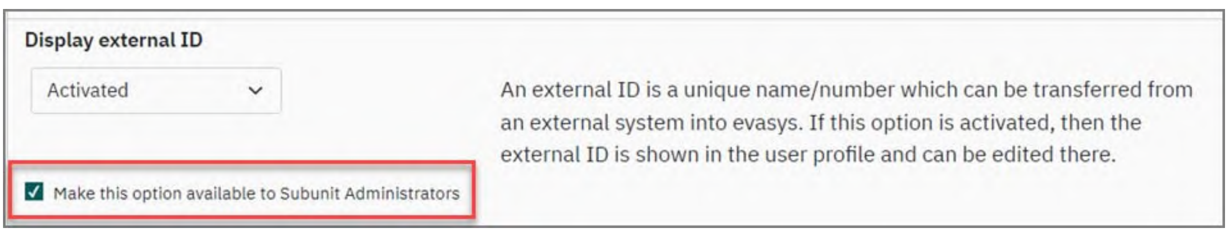


Figure 792: Option Activated for Subunit Administrator

With this function activated, the subunit administrators are able to implement settings which deviate from central settings.

Note:
Changes made by the subunit administrator overwrite the changes made by the administrator in the relevant subunits.

If any particular released configuration options are to be removed from control by subunit administrators, the marking can be removed.

Figure 793: Warning when Deactivating the Subunit Administrator Release

Note:
Please bear in mind that the settings created by the subunit administrators will be lost.

In the following overview all system settings (Setting “All“) which are by default available for subunit administrators are marked by the note “(SUB)” in the header line.

2.5.1. General

Title Login Window

Text of the title line on the start page.

System Language

Sets the default language of the evasys interface as well as all generated report documents. Users such as instructors, report creators etc. can select their own language in their user settings.

Education Suite	Corporate Suite	Healthcare Suite
English (Higher Education)	English (Seminar Providers)	English (Neutral)
English (Seminar Providers)	English (Neutral)	English (Seminar Providers)

Table 32: Available System Languages in the Suites

There are three language types available: Higher Education, Seminar Provider and Neutral. While in higher education language the terms “instructor” and “course” are used, in seminar provider language we speak of “trainer” and “course” and in neutral language of “projects (with project manager)” and “topics”.

Higher Education	Seminar Providers	Neutral
Instructor	Trainer	Project/Project Manager
Course	Course	Topic
Dean	Manager	Department Head
Dean of Studies	Program Manager	---
Program of Study	Program of Study	Group

Table 33: Differences in System Languages

Date Format

Here you can define the date format. The following characters are recognized (notice upper and lower case):

d - Day of the month, 2 digits with leading zeros
m - Numeric representation of a month, with leading zeros
M - A short textual representation of a month, three letters
Y - A full numeric representation of a year, 4 digits
y - A two digit representation of a year

Time Format

Here you can define the format for time.

h: Hour: 12-hour format, beginning with zero
H: Hour: 24-hour format, beginning with zero
i: Minutes, beginning with zero
s: Seconds beginning with zero
a: Lower case: ante meridian and post meridian
A: Upper case: ante meridian and post meridian

Decimal Separator (SUB)

The setting of the decimal separator affects the following areas in evasys:

- CSV raw data export
- CSV export of filter rules
- PDF report
- Norming
- QM View and quality index
- Display of response rate

Decimal numbers are represented accordingly. When entering decimal numbers into evasys, the use of both separators is generally allowed. If a comma is used as the decimal separator and as a CSV separator, decimal numbers are automatically displayed in the CSV file with a decimal point as the decimal separator.

Display of menu images

By default, this option is active, which means that menu images are displayed in the upper left corner throughout the entire system. If this option is deactivated, menu images are hidden, throughout the entire system.

Number of images for menu

The number of images that can be displayed alternatively in the screen. Please note that the images must be named and in the sub-folder “Bilder” The image name begins with “customer” and ends with a number. The file ending must be “jpg”. The first image is named “customer0.jpg” and the last image “customerxx.jpg” with “xx” being the number given in this setting.

Questionnaire list: Display questionnaire status (SUB)

The status column in the questionnaire list can be hidden or displayed. With a larger number of questionnaires, it is recommended to hide the status column so as to achieve a faster page loading. The column status indicates if a questionnaire's usage is restricted.

PDF format

Selection of the format for the creation of PDF documents.

DIN A4: 210 x 297 mm
Letter: 216 x 279 mm
Legal: 216 x 356 mm

2.5.2. Data Privacy

Minimum number of returns for reporting (SUB)

If the number of returns is under the value “n” there will be no display of the results (no PDF report, no HTML report, no raw data). Instead there will be a note in the letter (the function “generate letter” must be ACTIVATED). The note can be edited at “System Settings/Text Templates”.

Consider the minimum response for unweighted merged reports (SUB)

If activated, those questions which reached an insufficient number of responses are ignored. This function refers to the values for relative and absolute responses defined for the corresponding PDF report. See chapter B 4.7.6. "General Settings"

When deactivated every question will be included into the unweighted merged report.

Anonymization threshold (SUB)

The given value defines the number of returns (questionnaires) up to which the text of open questions has to be anonymized before being displayed. If the number of returns exceeds this value, the scanned images of the open questions are used.

If an edited value is saved, the available surveys are checked and their status is changed if appropriate. Please note the following: If the administrator changes a value, this value affects all surveys in the system, regardless of the settings any subunit administrators may have set. If subunits have differing values, then each respective subunit administrator must change and save their settings after the administrator has edited the value. This updates the surveys in the subunit administrator's area.

Display Participation Tracking

When deactivated, the menu item “Participation Tracking” in the section “Central Evaluation” is no longer displayed. To protect anonymity the minimum response rate for displaying participation tracking can be defined in the system settings, option “Participation tracking (online surveys): Protection of anonymity”.

Participation tracking (online surveys): Protection of anonymity (SUB)

With participation tracking available as a CSV export, the participation anonymity for online surveys is abrogated whereby the survey anonymity should be preserved. The minimal return value defined here must be attained so that the information on participation or non-participation of a specific survey can be released. Please observe that under certain circumstances a low value can compromise survey anonymity.

Check answers to open questions (SUB)

Activates/Deactivates the possibility as an administrator to delete single answers to open questions. This function can be used to delete inappropriate answers and can be accessed in the survey list for each survey. See also chapter B 3.17.3. "Check Responses to Open Questions"

Permit data export for open questions

When activated, the CSV raw data files also receive the responses to open questions collected in online surveys or after anonymization. For non-anonymized images the “Placeholder image files” will be used (see below).

Anonymous saving of deleted surveys

Deleted surveys are kept anonymously in a wastebasket so that the report creator can generate an accumulated subunit report.

Subunit administrator: View the original recognized forms

If this option is activated, then subunit administrators can view recognized forms as PDF files. If this option is deactivated and if also the following option “View Survey Results” is deactivated, subunit administrators can be completely excluded from accessing survey results.

Subunit administrator: View survey results

If this function is deactivated, then subunit administrators have no authorization to view or export survey results. If this option is deactivated and if also the preceding option “View the original recognized forms” is deactivated, subunit administrators can be completely excluded from accessing survey results.

Data entry assistant/Verifier: View entire original questionnaire page

If this function is activated, the data entry assistant and the verifier can view the entire questionnaire. This can be useful to capture text survey participants have written outside the borders of the given text boxes. But be aware that this also allows data entry assistants to take insight into answers of closed questions.

View reports as secondary instructor

If this option is activated, active and passive instructors/deans can view the reports of surveys for which they are defined as a secondary instructor. After logging into their account, they can access the reports via the “Reports central evaluation” / “My Surveys” menu and then view and add notes to the surveys.

Subunit administrator: Access to questionnaires

If activated, this option gives subunit administrators the ability to copy administrator's and secondary administrators´ questionnaires to use for their own surveys.

Data export: Include temporarily saved data

If activated, this setting allows online survey data that has been temporarily saved, but not transmitted, to be exported as raw data via the “Data Export” menu.

Retention period: Deletion Log

Defines how long entries are kept in the Deletion Log. The selected number corresponds to the number of months (max. 5 years). Older entries are automatically deleted from the system.

The value 0 means that the entries are kept permanently.

Retention period: Deliveries & Log Book

Defines how long entries are kept in the Deliveries and in the Log Book. The selected number corresponds to the number of months (max. 5 years). Older entries are automatically deleted from the system.

The value 0 means that the entries are kept permanently.

2.5.3. Survey

Tab “General”

Warning threshold in % for PDF report dispatch by email

Defines the threshold (percentage of pages not recognized) for the automatic dispatch of the PDF report. Explicit confirmation is necessary for manual dispatch of the report (Default: 70). NonForms are scanned pages which are no questionnaires or which cannot be recognized as questionnaires.

Warning threshold (in percent) for recognition problems during the processing of paper forms

The OMR error threshold has been exceeded, i.e. the VividForms Reader could not detect all checkboxes on the form. If this error occurs, a serious problem was found in the quality of scanned forms. The problem must urgently be analyzed and corrected before scanning the next forms. If the threshold defined here is exceeded for a survey, this survey will be marked red. The PDF report will not be dispatched automatically if this option is activated. Furthermore the evasys administrator gets a warning notice via email (Default: 0.2).

Default value course participants (SUB)

When no participant number has been defined for a topic/course, the default value for survey participants is used as a standard value for batch printing of forms in the menu “Batch Events”. This value can be adapted when batch printing (see chapter B 3.21.1. "Print Cover Sheets/Forms")

Email dispatch of questionnaires for the coversheet procedure (SUB)

If activated with each email dispatch of a coversheet the corresponding questionnaire will be sent, too.

Delete in two steps

If this function is activated then when you delete a survey you will only be deleting the data. The survey operation itself will be recorded in the system as proof. Another deletion will then result in the complete removal of the survey. If this function is deactivated then all survey data will be deleted immediately at the first deletion.

Method of calculating the response rate

Here, the method of calculating return rates can be set. Methods available are calculation based on the generated PSWDs (0), PSWDs sent (1) and the number of participants of the course (2). To show return rates of paper-based surveys, the option “2 = percentage of responses based on the course participants” must be selected.

PDF Report dispatch only on instructor's signature

If activated, the automatic dispatch of the PDF report is dependent upon the signature of the instructor on the cover sheet of the survey. Only when a signature is present will the PDF report be sent. This requires the use of the cover sheet procedure. In addition, the configuration setting “Conditional email report dispatch” (Email Functions & Accounts) must be set to the value “survey”.

Coversheet: Show Creation Date of Survey

If activated, the creation date of the survey is displayed on the coversheet. Please note, should this be the case, the space for the description text at the bottom of the coversheet is reduced.

First volume license warning threshold

When the remaining volume for processing questionnaires falls below the threshold defined here, a warning message will be emailed automatically to the evasys administrator. The default value is 500.

Second volume license warning threshold

When the remaining volume for processing questionnaires falls below the threshold defined here, a warning message will be emailed automatically to the evasys administrator. The default value is 250.

Tab “Instructor’s Optional Questions”

Instructor’s Optional Questions: activation status (SUB)

Here you can activate or deactivate the Instructor’s Optional Questions (Optional Questions for instructor/trainer/project manager), see chapter B 3.20. "Adding Questions Using the Instructors Optional Questions".

Instructor’s Optional Questions: modify course data (SUB)

Permits or prevents instructors from modifying the course data in the Instructor’s Optional Questions.

Instructor’s Optional Questions: question library (SUB)

Defines whether the instructor can use the question library in the Instructor’s Optional Questions.

Instructor’s Optional Questions: direct delivery of questionnaire/PSWDs (SUB)

If this function is activated, then once the instructor’s optional questions is complete the email with the questionnaire and the PSWDs is sent directly to the instructors. If this function is deactivated, then all emails are sent to the group address given in the email category.

Instructor's Optional Questions: email for deactivation contains PSWD list (SUB)

Deactivating the Instructor's Optional Questions a PDF with the PSWDs can be added.

Instructor's Optional Questions: Status change (SUB)

If activated, the status of Instructor’s Optional Questions in the survey overview changes to “completed” as soon as the VividForms Editor is opened. If deactivated, the status changes when the save and exit button in the Instructor’s Optional Questions is clicked.

Instructor’s Optional Questions: reasons for not conducting a survey (SUB)

The reasons for when a survey cannot be held or should not be held can be selected in the Instructor’s Optional Questions.

Instructor’s Optional Questions: Email to the administrator when survey canceled (SUB)

Send an email to the administrator when the setting in the Instructor’s Optional Questions has been activated that the survey has been canceled.

Instructor's Optional Questions: Allow instructors to create their own learning objectives for outcome-based evaluation

If activated, the users of the instructor’s optional questions can define new and edit existing learning objectives in the question library.

Instructor´s Optional Questions: Rights to add questions in the ´Predefined Optional Questions´ mode

Defines the rights of creating or adding questions in the "Instructor´s Optional Questions" view for users of "Predefined Optional Questions":

1 = Administrators only

2 = Administrators and Subunit administrators

Instructor´s Optional Questions: User rights for adding questions to the question library for predefined optional questions

Defines the rights of creating or adding questions in the "Instructor´s Optional Questions" view for users of "Predefined Optional Questions":

0 = Instructors cannot access the question library

1 = Instructors may only add questions from the question library

2 = Instructors may enter or add any questions from the question library

Tab “Module Evaluation”

Module Evaluation: Display of name of the (secondary) instructor in the heading of the question group (SUB)

If activated, the names of the (secondary) instructors are displayed on the aggregated questionnaire. In this case in each first question group heading of a partial questionnaire, the name of the relevant instructor is displayed. This setting helps you to relate the questions to the instructors. It only affects new surveys, existing surveys are not concerned. See chapter B 7. "Module Evaluation".

Module Evaluation: Display the name of the question group in the first question group heading (SUB)

If this setting is activated, the name of the question group is displayed in each first question group heading on the aggregated module questionnaire. This setting only affects new surveys, existing surveys are not affected. See also chapter B 7. "Module Evaluation".

Module Evaluation: Line breaks in the heading of the first question group (SUB)

This option determines whether line breaks are allowed in each first question group heading of a partial questionnaire. It serves to avoid shifts if the separate questionnaires are designed to fit into a fixed number of pages. Changing this setting only affects new surveys, existing surveys are not affected. See also chapter B 7. "Module Evaluation".

Module Evaluation: Delivery of module sections with no instructor (SUB)

If this function is activated, reports from module sections (courses) which are not assigned to an instructor, are sent to all instructors for that module. These module sections are, in this case, viewed as general polls about the module. If this function is deactivated, each instructor for a module section receives only their own report. This option only affects the automatic delivery of reports directly after scanning and the delivery of reports using scheduled tasks.

If the results are sent via Batch Events and if no report recipient is defined for the corresponding part of the module, then the report for this module part is not sent separately but is only part of the overall report for the module manager. If a module part is supposed to be sent to all recipients they have to be defined as report recipients in the details of the module. See chapter B 7. "Module Evaluation".

Module evaluation: Manage participants separately for each module part (course)(SUB)

If activated, participants can receive module parts (courses) separately. In case of online surveys, use this function to automatically filter the questionnaire, so that each participant receives only the module parts s/he has been assigned.

2.5.4. Survey Online

Highest permitted number of PSWDs per survey (in active account)

Defines the maximum number of participants in an online survey. This value is theoretically unlimited, but should be limited to an acceptable size for the organization. Default value is 1000.

In the case of intensive use of PSWD-based online surveys, it is advisable to delete unused PSWDs after completing an evaluation period. See chapter D 1.11. "System Cleaning".

Default value PSWD number per survey (in active account)

This number is recommended in instructor accounts as the number of participants for a survey.

Server address for online evaluations

This address is used on the PSWD cards and in the PSWD emails. It directs the online survey particpant to the entry mask for the PSWD.

Server Address for Direct Online Survey Access

This address is used for links by which an online survey can be opened directly (i.e. without the login screen). This applies, for example, to the use of the placeholder [DIRECT_ONLINE_LINK] or the QR code. The address must end with the main folder and a slash (e.g. http://example.com/evasys/). The remainder of the URL is supplemented dynamically. If QR codes are to be used, the specified URL may not exceed a length of 80 characters.

Default value PSWD per survey (central evaluation)

Online surveys created in central evaluation use as the number of participants the number of students that can be admitted to a particular course. If this number is missing then the value defined in this constant is used.

Format PSWD document (SUB)

Different formats are available for the PSWD document:

1 = 3x8 PSWDs per page (A4)
2 = 2x7 PSWDs per page (A4)
3 = 3x7 PSWDs per page (A4)
4 = 3x6 PSWDs per page (Letter)
5 = 3x8 PSWDs per page (A4) with QR Code
6 = 3x6 PSWDs per page (Letter) with QR Code

7= 3x8 PSWDs per page (A4) with profile image

8= 3x6 PSWDs per page (Letter) with profile image

QR Code is a registered trademark of DENSO WAVE INCORPORATED.

Depending on the selected format, pre-perforated sheets ore adhesive labels can be used for printing the PSWD cards. See chapter A 3.3.6. "Adjustments in evasys Settings".

Design template for online surveys

Default file with design templates for online surveys. In the details of a subunit other specific online templates can be assigned. For the adaption and creation of online templates see chapter B 3.15.2. "Customization of the Used Layouts".

Alternative forwarding for online surveys

This option activates the forwarding of participants to online surveys. After dispatch, the participants are forwarded according to the settings under “System Settings/ evasys Settings/Survey online/Alternative forwarding address for online surveys“. Questionnaire specific forwarding (Details of a questionnaire / Advanced Settings) will not be affected by this switch. When activating alternative forwarding, the list of surveys for a participant which is by default displayed after a participant submits a form will not be displayed.

Alternative web address for forwarding the participants of online surveys

The participants of online surveys are, after dispatch of the results, forwarded to the Email address given here. The address must be given, complete with protocol (i.e. http://). Additionally you can activate questionnaire specific forwarding in the details of a questionnaire which is independent of this setting.

Language selection using images (SUB)

If activated you can select the language for multiple-language online questionnaires by language icons (Flag symbols). The icons must be defined in the details of a questionnaire (Advanced Settings/Languages) for the languages. If this option is deactivated, languages can be selected using a drop-down box.

Allow password based online surveys (Central evaluation)

If this option is activated, a PSWD-based survey, for which PSWDs have not yet been sent and for which there are as yet no responses, can retroactively be converted to a password based survey. This setting is only valid in central evaluation; this means, active user accounts are not affected. They can always create single password surveys. Please note that with single password online surveys you cannot prevent participants from taking part in the survey more than once.

Creating Passwords for Single Password Surveys (SUB)

Defines the way a password is automatically generated for single password online surveys.

1 = Password in PSWD format (5 digit combination of letters and numbers)
2 = Use course ID as password
3 = Password content is course user data field 1
4 = Password is content of course user data field 2
5 = Password is content of course user data field 3
6 = Password is content of course user data field 4
7 = Password is content of course user data field 5

Please note: A Password must be unique system-wide “unique”. If this is not the case (when, for example, using content from course user data fields), a password will be generated in the PSWD format. PSWDs may not contain any spaces. These will be automatically replaced with underscores.

Alternative forwarding including authentication

Participants of online surveys can be directed to a different internet site once their survey is submitted. The forwarding occurs based upon the forwarding address which is defined in the details of the corresponding questionnaire. Each questionnaire can be given an individual forwarding address.

The following option determines whether the authentication for forwarding requires a value chosen from the properties of a course.

Use the following field to determine the “secret word”:

0 = no course user data fields (If no “questionnaire specific spare secret password” has been defined in the details of the questionnaire, no “secret password” will be requested for the authentication.)

1 = Course user data field 1
2 = Course user data field 1 + Survey-ID
3 = Course user data field 2
4 = Course user data field 2 + Survey-ID
5 = Course user data field 3
6 = Course user data field 3 + Survey-ID

7 = Course user data field 4
8 = Course user data field 4 + Survey-ID
9 = Course user data field 5
10 = Course user data field 5 + Survey-ID

Please note: If no questionnaire specific forwarding address was defined in the details of the questionnaire, the forwarding occurs based upon the system-wide defined forwarding address - Menu “System Settings/evasysSettings/Survey Online/Alternative forwarding for online surveys” - no “secret word” will be used.

Display the List of All Current Surveys After Submitting an Online Survey

If activated, once an online survey is submitted, a list of all surveys of the current period is displayed, for which the participant has received a PSWD. The student can participate directly in surveys which are still open and sees the surveys in which s/he has already taken part. As a precondition, the survey participant must have received the PSWDs by email.

Figure 794: Survey List after having submitted an online survey

Prevent premature display of surveys in LMS (SUB)

If this option is activated and new surveys are generated with time control, these are closed immediately on generation. The surveys are opened as soon as the first scheduled task, which dispatches passwords to participants, is executed. By closing the surveys it can be avoided that these are visible in learning management systems (LMS) in the short period of time between creating the surveys and defining the scheduled tasks.

Please note: Only the scheduled task which dispatches passwords will open the surveys. If this procedure is not used, this option should not be activated.

For creating online surveys with time control see chapter B 3.10. "Online Survey with Time Control".

Allow Merged Scheduled Emails

Option 1 and 2 ensure that users who are scheduled to receive PSWD emails receive all other surveys emails simultaneously in one email, and replace [DIRECT_ONLINE_LINK] with a list of online links.

0 = deactivated

1 = All surveys emails, based on the same questionnaire will be merged. The "PSWDs for online survey participant" text template of the questionnaire is used.

2 = All surveys emails will be merged regardless of the based questionnaires. The system-wide text template "EMAIL: Merged list of PSWDs for online survey participant" is used.

Design the email texts in the text templates accordingly.

The placeholder [DIRECT_ONLINE_LINK] is a prerequisite for this function. Please do not delete the placeholder or insert it as plain text. All survey-specific placeholders will be removed in case of a merged mail.

Select option 2 if you use module surveys and wish to send PSWDs for more than one survey at a time.

For further information, see chapter B 3.15.11. "Merge scheduled Emails".

Delayed Report Dispatch

Defines the number of days the report dispatch is delayed in the scheduled tasks when the online survey is closed. (Maximum are 100 days)

Please note: Only the dispatch of the PDF report to the defined report recipients will be delayed. If you have set result access for survey participants in the questionnaire details and activate the result information email in the schedulded tasks, these emails will be sent out without time delay. Therefore, make sure you really want to allow the participants to view results.

You can also set this configuration option in the LTI interface.

2.5.5. Data Import and Export

Placeholder image files

Output text in the CSV raw data for textboxes not yet anonymized. The image files cannot be exported via CSV.

Separators CSV import and export (SUB)

Defines the separators for CSV import and export. Accepted: semicolon, comma, tabulator (/t) and the vertical line (|). The default setting is comma.

Synchronization URL for the XML import

XML export interface of the external system, whose organizational data is to be synchronized with evasys. As an alternative you can import data via an XML file.

Method password creation user import (SUB)

Rules for setting up new users through CSV/XML import.

0: User name/password put on email address
1: User name/password are generated randomly

Please note that the user name in evasys has to be unique. It may only occur once. When using option 1 (generate randomly) this can be guaranteed.

Activation status faculty import (SUB)

Rules for setting up new users through CSV/XML import.

0: Instructor account is deactivated after import (Central Evaluation)
1: Instructor account is activated after import (De-central Evaluation)

An active account allows project managers/trainers to create their own surveys, independent of the surveys in central evaluation.

SPSS Missing Values (SUB)

This option defines whether the abstentions in the SPSS export
are defined as “Missing Values”

1 = Abstentions are defined and exported as “Missing Values”
0 = Abstentions are exported as ordinary values

If abstentions are exported as ordinary values, they obtain the value 0. When calculating a mean value of all the results in SPSS, the abstentions contribute to the mean value and thus distort the result.

For that reason you can define the abstentions as “Missing Values” when being exported to SPSS. If you activate this option (setting “1”), then for every questionnaire where you have defined the possibility of abstentions, each abstention is exported as a Missing Value with value o to SPSS. SPSS ignores the “Missing Value” when computing the mean value.

Export values and variable names can furthermore be adapted in the details of a questionnaire, section “Advanced Settings/Data Export Configuration”.

Sphinx path

If the path of the local Sphinx application is defined, a batch file will be generated during the Sphinx export. Running the batch file allows Sphinx to display the report immediately. . An adapted report file for Sphinx can be defined for each questionnaire in the questionnaire details (”Advanced Settings/Sphinx-Report”).

Raw data export contains only the ID of non-anonymous participants (SUB)

If activated, the raw data export contains only the ID (email address) of the participant. This option is only available for non-anonymous surveys where the participants are known with names in the system. If this option is deactivated all available participant data will be exported.

Char encoding for CSV-Export

Defines the char encoding for the CSV export. Use the option Unicode if non-Latin characters are used.

ISO 8859-1 is a norm which defines the display of the western European font.
ISO 8859-2 is a norm defining the east European character set. Through ISO 8859-2 a CSV file with east European characters can be directly and correctly opened in Excel.

Unicode is a comprehensive standard for the presentation of characters through a computer which makes numerous characters presentable worldwide – for example Chinese fonts. The evasys server displays its web pages in the unicode font UTF-8.

Re-Import of CSV raw data

If this setting is activated, reworked CSV raw data for a survey can be imported in the survey details.

2.5.6. User Data Fields

Tab “Courses”

Content of the Selection Field for the Course Name/the Course ID/the Program of Study/the Location (SUB)

Enter the predefined selection values for the name of the course/the course ID/the program of study/the location here. Separate the values by the vertical line (or ´pipe´) “|” (Alt + Ctrl +>). In addition to the values shown here, other (arbitrary) values can be entered in the details of a course, which do not have to be predefined here.

Number additional fields (SUB)

Sets the number of user definable courses (maximum 20). Zero corresponds to “no additional fields“.

Title of the 1st to the 20th additional field (SUB)

The title of the corresponding additional field.

Content of the 1st to the 20th additional field (SUB)

Designation of permitted values for the additional fields. The values must be separated by “|” (CTRL+ALT+>).

Tab “Participants”

Number of additional fields

Sets the number of custom participant data fields for capturing user information (maximum 20). Zero means “no additional fields“.

Title of the 1st to the 20th additional field

Enter the title of the corresponding additional field here. The titles are displayed in the participant list of a non-anonymous course.

Cross-listed Courses

Defines a field for cross-listed courses, so that surveys of courses listed in different departments can be analyzed together in a summary report. Note that the instructor has to be the same for all courses, and that module surveys and surveys with instructors´ optional questions are excluded.

2.5.7. Functions

Tab “General”

Period display (SUB)

Displays the current period top right in evasys.

Permit Kiviat diagram

Enables the display of Kiviat diagrams in the survey details of active accounts. This function is not available for surveys in central evaluation. To create a Kiviat diagram, at least three indicators must be defined for the questionnaire.

Minimal survey number report creator

Minimal number of surveys which have to be selected to create a summary report in the report creator. The value “0” means that there is no minimum number of surveys to be combined. This way you can also create reports based on single surveys.

Permits immediate deletion of data

This defines whether in active accounts the analyzed survey results can be deleted as soon as the report e-mail is sent (“activated”). The setting “deactivated” hides the option to configure the settings for this function.

Delete blank questionnaires

If activated, blank questionnaire returns will be deleted directly after the data has been processed. Blank questionnaire returns are questionnaires in which no answer option has been selected and no open question has been answered. To specify the circumstances in which multiple choice questions should be considered unanswered, check the setting “Evaluation of Multiple Choice questions without answer”.

For online surveys, this setting does not affect survey data that already exists. For paper surveys, activate this setting to check all results of the survey. This setting has no effect on existing data for online surveys. If new paper returns are scanned, results for surveys that were already processed are proofed for empty results again.

Evaluation multiple choice questions without answer

This settings only refers to the function “Delete blank questionnaire returns”. If you have deactivated this function, this setting has no effect.

Activated = Multiple choice questions are treated as answered, even if no answer options have been selected. This way, questionnaires with multiple choice questions are never treated as blank questionnaire returns, even if no question has been answered.

Deactivated = Multiple choice questions are treated as unanswered if no answer option has been selected. This way, questionnaires are treated as blank questionnaire returns if not at least one answer option has been selected or one open question has been answered.

Hide bar diagram shadow (SUB)

Hides the bar shadow in PDF reports.

Hide end of document text (SUB)

Hide text “End of the document” in certificate of participation and certificate of results.

Hide page number end of document (SUB)

Hide page number on last page of certificate of participation and certificate of results.

Duplex Printing (SUB)

The PDF document contains blank pages for duplex printing (after a cover sheet and in case of an odd page number of a questionnaire). Thereby it can be guaranteed that when batch printing forms, each page of a multipage questionnaire always starts on a new sheet of paper.

Batch printing: form printing when using the cover sheet procedure (SUB)

When using the cover sheet procedure, apart from the cover sheet the form will be included in the PDF either in the defined participant number for the course or once, depending on whether this button is activated.

Batch events: Naming conventions for PDF reports in ZIP files (SUB)

If PDF reports are opened in the batch events as individual reports merged in a ZIP file, then the file name for the PDF reports is created using the naming conventions defined here. By default, the following placeholders are used: [SUBUNIT]-[SURNAME]-[FIRSTNAME]-[SURVEYID]-[SURVEY]. All in all you can select from the following placeholders:

Placeholder	Meaning	Example
[SURVEY]	Name of Survey	Political Economics 1 A
[SURVEYID]	Survey ID	23456
[QUESTIONARY] [QUESTION-NAIRE]	Name of Questionnaire	DEMOFORM
[COURSETYPE]	Name of the Type of Course	Seminar
[SUBUNIT]	Name of the Subunit	Economics
[COURSENAME]	Name of the Course	Political Economics1 A
[COURSEID]	Course ID	0112345
[LECTURER]	Name of Instructor	Prof. Dr. Max Mustermann
[SURNAME]	Surname of Instructor	Mustermann
[FIRSTNAME]	Forename of Instructor	Max
[USER_EXTER-NAL_ID]	External ID of the instructor	MM1202
[UNITNAME]	Name of the module (only Module Evaluation)	Basic Module rhetoric
[PERIOD] [PERIOD_NAME]	Name of the survey period	WS 15/16
[ISO_DATE]	Date in ISO syntax	2011-03-08
[ISO_DATETIME]	Date with time in ISO format	2011-03-08T16:19:20
[TIMESTAMP]	Date given according to the date and time format configured in evasys	10.12.2010_091853
[CURRENTDATE]	Date given according to the date format configured in evasys	10.12.2010

Table 34: Placeholder for the batch printing of PDF reports

Special characters are filtered out of the filenames and spaces are replaced by underscores. If a file name is not unique, for example because a course ID appears more than once, the file name is amended with a counter. When defining the naming conventions, the following characters and special characters may be used:

All letters and numbers

Round brackets (Parenthesis): ( )

Square brackets: [ ]

Hyphen: -

Comma: ,

Period or full stop (dot): .

Equals sign: =

Underscore: _

Subgroup Reports (PDF report definitions): Naming convention for PDF reports in ZIP files

Defines the naming convention to use for the subgroup report that is comprized of a ZIP file of the merged individual PDF report definitions.

Placeholder	Meaning
[QUESTION_NUMBER]	Question number. The placeholder can only be replaced if the display of internal question numbers is activated in the report settings.
[OPTION_NUMBER]	Number of the answer option
[OPTION_TEXT]	Text of the answer option

Serial dispatch of the profile lines for active user accounts

If activated, the serial dispatch of the profile lines can also be used for active user accounts. If deactivated, the report creator can only select topics from central evaluation, i.e. only topics created by administrator or subunit administrator.

Blocking time for pages of forms in the Web Verifier

Time in minutes, for which a page of the form is blocked by a user (verifier). During this time no other user (verifier) can access the form (default value: 20).

Force settings of the administrator

If activated, after the results of a paper based survey are analyzed, the administrator's settings, not those of the relevant subunit administrator, are used. This affects all settings in the system settings.

Automatic verification

The automatic verification allows certain cases of a batch to be verified automatically. Furthermore you can completely skip verification for a batch. For further information see chapter B 4.4.5. "Automatic Verification".

Create distribution for the report for the dean (of studies) (SUB)

This function shows the distribution of results from all reports and is only available for reports to the dean, the dean of studies and the president. There is a distribution graph for each active indicator of a questionnaire in the additional reports of the report creator. See also chapter B 5.2.9. "Result Reports".

Open tree structure

If this option is activated, the open tree structure, configured parallel to the standard structure, will be activated. In the tree structure you can change the order of elements within the evasys organizational structure. This allows you to flexibly filter your data when displaying, generating or deleting surveys or when creating any compilation reports in the report creator. See also chapter B 3.19. "Tree Structure".

Data entry assistant: Sending a report to the instructor

If this function is activated, the data entry assistant can use a button to send a PDF report to the instructor once all survey comments have been processed.

Display external ID (SUB)

An external ID is a unique name/number for instructors/trainers/project managers which can be transferred from an external system into evasys. If this option is activated, then the external ID is shown in the user profile and can be edited there.

Name for external IDs (SUB)

Defines the name under which external IDs are shown in the user profiles. If nothing is specified here, the default name “external ID” is used.

Categorizing the Answers to Open Questions

If activated, the administrator/subunit administrator can categorize the answers to open questions. See chapter B 4.6. "Categorization of open questions".

Data Entry Assistant: Categorizing the Answers

If activated, the data entry assistant can categorize the answers to open questions during or after processing.

Note: The configuration setting “Categorizing the Answers to Open Questions” must be activated beforehand.

Report Creator: Categorizing the answers to open questions

If activated, the report creator can categorize the answers to open questions in the details of reports which contain open questions.

Note: The system setting "Categorizing the Answers to Open Questions" must be activated beforehand.

Subunit Administrator: Notification on Defined Evaluation Results

If this option is activated, subunit administrators can configure the automatic notification of defined evaluation results for their subunit themselves (menu “Subunits/QM Notification”). If this option is deactivated, the administrator settings will apply.

Display of User Names in the Subunit Overview (SUB)

Defines how the user names appear in the overview of a subunit.

0 = Title First name Last name
1 = Salutation Title First name Last name
2 = Last name, First name, Title
3 = Last name, Title First name

Profile images for instructors

This option allows profile images or logos to be uploaded in instructor user settings. These images are used in the system (e.g. in the survey list) and in the online survey (e.g. in the online survey header).

Extras menu: Display mode (SUB)

The Extras menu, which provides free documents and information materials on evasys directly from the manufacturer, is available for administrators and subunit administrators. If this function is activated, the Extras menu will also be displayed in the active user account, which means that active users can download useful tools for their work with evasys themselves.

Extras menu: Check for new content (SUB)

If this function is activated the system will automatically check if new content is available for the Extras menu. This check will take place every 7 days when a user logs into the system. After the check, the menu is marked with a corresponding note. When checking for new content, data is transferred from the evasys system to the Extras server. The following information is included: the customer number, the ID of the supplier, the system language, the evasys version, the product derivative, the organization name, the content of the system setting “server root path”, the internal user ID, license information and a unique ID for the check itself, which is added for security reasons.

All this information is SSL encrypted and used solely for technical purposes. No personal data or survey data captured by your system is transmitted. If you do not want to transfer the above mentioned information, deactivate this function.

Display the source data & filter settings in reports of the report creator (SUB)

If activated, the summary reports of the report creator can contain information about the source of data (original surveys) and, in case of “Any Compilation reports”, also about the filters used when creating the report in report creator. Report details includes a select box that allows you to include this information.

Use Department No. for ordering the subunit lists

If activated, subunit lists are ordered by the department number instead of alphabetically.

Safe paste (SUB)

If this function is activated, invalid control characters are removed when copying text into entry boxes (e.g. in the question wizards in the VividForms Editor).

Attention: If this option is deactivated, the safe paste dialog will no longer be opened when copying text into entry boxes. This may result in HTML control characters being copied, which again can evoke issues in the software. For example, online surveys may not be displayed correctly or may be prevented from being submitted. You should only deactivate this function if you can ensure that you only work with plain text, or if you use browser functions which ensure that only plain text is inserted.

Tab “HTML Report”

HTML Report: Link validity period

Defines how many days the link to the HTML report is valid after it has been sent by email. After the set number of days has elapsed, the report can no longer be opened via the link. If the value “0” is entered, the link is permanently valid.

HTML report: Relative values (SUB)

The HTML reports show the distribution of the responses to closed questions with relative (activated) or absolute (deactivated) values.

HTML report: Minimum percentage for display (%) (SUB)

Defines the minimum percentage of response frequency to a question in relation to the total number of returns needed in order to display the respective question in the HTML report. If the value is set to “0”, all questions of the reports will be displayed.

HTML report: Minimum percentage for display (absolute) (SUB)

Defines the minimum absolute response frequency to a question required in order to display the question in the HTML report.

Please also consider the setting “Show notice for suppressed report”.

HTML report: Consider minimum responses for filtering and comparisons on answer level (SUB)

If activated, the defined minimum response value for display is considered for single answer options when setting filters or activating comparisons in the HTML report. If one or more answer options of a question fall below the defined threshold, you can not longer set a filter or comparison on this question.

HTML report: Comparison based on answers

If activated, results that have been dynamically filtered on the basis of selected answers can be compared in the HTML report. In this way, subgroups of respondents can be compared with each other.

HTML Report: Allow display of open questions

If activated, internal report recipients are allowed to view the answers of open questions. For participants only the setting for the questionnaire or survey applies. If this switch is deactivated, participants may still have the right to view open questions.

HTML report: Separate closed/open questions (SUB)

When activated the results for open and closed questions in the HTML reports are displayed separately. This results in better readability particularly of those reports created with a mix of open and closed questions.

HTML report: Listing of open questions (SUB)

Listing and counting of comments in the report.

HTML report: Main color

Defines the main color of the HTML report. Please note that if you change the default color value (#095A5A), the report may no longer be accessible according to WCAG 2.1 AA. The compliance logo is not shown anymore.

HTML report: Font color in contrast to main color

Defines the font color when the main color is used as background (e.g. for question group headings). Please note that if you change the default color value (#FFFFFF), the report may no longer be accessible according to WCAG 2.1 AA. The compliance logo is not shown anymore.

2.5.8. Central Evaluation

Creation of summary reports

Permits the creation of summary reports, e.g. for the dean’s report, dean of study’s report as well as the president’s report. These reports can be created by the report creator. Please note, that as a precondition indicators must be defined for the used questionnaires.

Report president

Report function for the president.

Report dean

Report function for the dean.

Report dean of studies

Report function for the dean of studies.

Program of study reports

Report creator can download reports on programs of study.

Instructor profile reports

Report creator can download reports on instructor profiles.

Dean of Studies

Toggles existence of the Vice-Dean

Quality Management

Activate/deactivate the availability of quality assurance and QM views. Quality Guidelines can be set for each questionnaire in the questionnaire details, section “Advanced settings”. See also chapter B "The window with the details of the created percentile rank norm appears.".

Passive instructor: Login for report request

Passive project managers can log in to evasys and request existing reports for their topics from central evaluation. This function allows an SSL encrypted access of survey results (if set up accordingly) in contrast to the unencrypted sending of PDF reports by email.

Active instructors: Access to reports from central evaluation

In the menu of the active instructor account there is a link which allows access to the course reports from the central evaluation. See notes above.

Active instructor surveys visible in QM Views

Here you can choose, whether you want to see the surveys of active instructors in addition to the surveys of the central evaluation if quality guidelines are defined for the questionnaires used for these surveys.

Display of course-ID in the list of surveys

Display of the course-ID behind the name of the course. Here you can choose if you want to display the course-ID in the list of the surveys and in the header of the PDF report. If activated, the name of the survey consists not only of the name of the course, but also of the course-ID (following the name in brackets). Additionally the course-ID is displayed in the header of the PDF report (again after the course name).

Preselection “Select program of study”

This setting preselects the programs of study in the relevant selection dialogs. However, it is always possible to select and deselect manually.

2.5.9. Email Functions & Accounts

Attach PDF report (SUB)

Attach PDF report to the report email.

Attach CSV file (SUB)

Attach CSV export with the raw data of the survey to the report mail.

Limit for file names in email attachments

The amount of maximum characters for the file names in email attachments. The value 0 deactivates the cutting of characters.

Subject: Replace special characters

If activated, in the subject of every email special characters will be replaced to anticipate problems with some email clients.

Delivery method PSWDs (central evaluation) (SUB)

1: Send PSWDs to online survey participants via the administrator (Survey List)
2: PDF lists of PSWDs for printing and distribution will be sent as batch emails to the instructors (Batch Events)

Conditional email report dispatch

Send email report after scanning depending on the settings of the:

- admin: settings of the administrator at Process Defaults
- dep.admin: settings of the subunit administrator at Process Defaults
- user: configuration of the respective user
- survey: according to the information on the cover sheet. Please note the option “PDF Report dispatch only on project manager's signature” in the section “Survey”.

Instructor’s Optional Questions: group address

Group address to which the questionnaires personalized with the Instructor’s Optional Questions are to be sent. See also chapter B 3.20. "Adding Questions Using the Instructors Optional Questions"

Sender name for all system emails (SUB)

Sender name that is used for all emails sent by evasys.

Sender mail address for all system emails (SUB)

Sender address that is used for all emails sent by evasys.

Email address of the support department

This address will be used when sending emails to the support department.

Dean's copy evaluation

When sending the PDF reports via the “Process Defaults”, deans of the discipline/subunit receive a copy of the instant report.

Dean's copy open ended questions

The dean’s copy of the instant report contains responses to open ended questions.

Archive mailing of PDF reports (SUB)

0: Archiving functions deactivated

1: A copy of each email concerning reports will be sent to the configured archive address (compare configuration “Email address of the archive”). This applies to the reports of the central and decentral evaluation as well as to the profile lines sent by the report creator.

2: The function “Archive reports and raw data” in the menu “batch events” is activated.

3: Both functions (1) and (2) are activated.

Please bear in mind that the archive mailing of PDF reports is only possible if you have defined a valid archive email address (option “Email address of the archive”). In the menu “System Settings/Text Templates/E-MAIL: Meta data for archive email” you can add placeholder for meta data of the surveys to be archived. This can be useful if you want to tag data for storage in a document management system.

Email address of the archive (SUB)

Defines the recipient address of the email archive function.

Maximum number of attachments (SUB)

The maximum number of email attachments. Apart from survey results (PDF reports and CSV data) also attachment defined for a text template will be considered.

Maximum size of attachments (SUB)

The maximum size of attachments in MB concerning the mailing of PDF reports.

Emails in HTML Format

If this function is activated, emails are sent in HTML format. You can then use HTML tags in the text templates for formatting and linking.

Password protection for reports sent by email (SUB)

If a password is defined, reports that are sent by email require the password to open. If no password is defined, no password is required.

Please note:

- The password protection does not work for PDF/A reports. These reports are not protected.
- This setting does not affect the mailing functions of user accounts.
- Password protected reports cannot be edited with PDF editors.
- Depending on the compatibility of the plug-in, PDF report plug-ins might not work with passwords.

The password cannot exceed 32 characters. Allowed characters: a-Z, 0-9, ,;.:-_?!"$%&/()+*~#´|<>. Blank characters are not allowed.

Naming conventions for PDF reports in emails (SUB)

If PDF reports are sent by email (eg via the batch events or on the survey list or survey details), then the file name for the PDF file is created according to the naming conventions defined here. This setting only affects the central evaluation. PDF Reports that are sent by active users (such as instructors or report creators) are not affected.

By default, the following placeholders are used: [PERIOD]-[SURVEY], so the name of the period and survey name, eg “WS15/16-Principles_of_Rhetoric”. Overall, the following placeholders are available:

Placeholder	Meaning	Example
[SURVEY]	Name of Survey	Political Economics 1 A
[SURVEYID]	Survey ID	23456
[QUESTIONARY] [QUESTIONNAIRE]	Name of Questionnaire	DEMOFORM
[COURSETYPE]	Name of the Type of Course	Seminar
[SUBUNIT]	Name of the Subunit	Economics
[COURSENAME]	Name of the Course	Political Economics1 A
[COURSEID]	Course ID	0112345
[LECTURER]	Name of Instructor	Prof. Dr. Max Mustermann
[SURNAME]	Surname of Instructor	Mustermann
[FIRSTNAME]	Forename of Instructor	Max
[USER_EXTERNAL_ID]	External ID of the instructor	MM1202
[UNITNAME]	Name of the module (only Module Evaluation)	Basic Module rhetoric
[PERIOD] [PERIOD_NAME]	Name of the survey period	WS 15/16
[ISO_DATE]	Date in ISO syntax	2016-03-08
[ISO_DATETIME]	Date with time in ISO format	2016-03-08T16:19:20
[TIMESTAMP]	Date given according to the date and time format configured in evasys	10.12.2015_091853
[CURRENTDATE]	Date given according to the date format configured in evasys	10.12.2015

Table 35: Placeholder for batch mailing PDF reports

Special characters are filtered out of the filenames and spaces are replaced by underscores. If a file name is not unique, for example because a course ID appears more than once, the file name is amended with a counter. When defining the naming conventions, the following characters and special characters may be used:

All letters and numbers

Round brackets (Parenthesis): ( )

Square brackets: [ ]

Hyphen: -

Comma: ,

Period or full stop (dot): .

Equals sign: =

Underscore: _

2.5.10. Color Settings

Predefined Color Scheme

The color scheme of the evasys interface can be changed by an alternative color scheme. There are different predefined schemes available. Activate the checkbox left to the drop-down-menu to select an alternative color scheme.

Manual Color Settings

You can define you individual colors for all parts of the evasys interface. To do so, select a color from the color selection dialog or enter the hexadecimal or RGB values.

2.5.11. Instructor Accounts

Display question numbers

Question numbers are displayed when processing the optional additional questions.

Activate link to PDF preview

When activated, users can click on a questionnaire name in the list of surveys in order to see a sample of the questionnaire.

Allow survey result access for open surveys

If activated, active and passive instructors are allowed to access reports of central surveys which have not been closed. This means they can view partial results. If deactivated, they can only access reports of surveys that are closed.

This switch requires that the user must have credentials to view results of central surveys, which can be set under “Central Evaluation-Passive instructors: Login for report request” or “Central Evaluation-Active instructors: Access to reports from central evaluation”.

Allow Data Entry

When activated, this setting allows active users who are generating paper surveys to enter answers to open questions. After the survey is processed, survey details will contain a menu that allows users to type the handwritten comments.

Categorizing answers to open questions

If this setting is activated, active instructors users can categorize the answers to open questions.

Note: The configuration setting “Categorizing the Answers to Open Questions” in the section “Functions / General” must be activated beforehand.

2.5.12. VividForms

Recognition Set Folder

Recognition set folder for VividForms Forms.

Image directory for open questions

Path to a directory in which the VividForms Reader will store the images of an open question.

Default form editor access for users

You can set the following access modes:

0 = Unrestricted access
1 = Only templates
2 = No access

Cover sheet text

Instruction text on the cover sheet.

Default Font size

Default font size for VividForms questionnaires.

Allow editing of HTML code in the VividForms Editor

If activated users are allowed to edit HTML code in the VividForms Editor. Thereby questionnaires for online surveys can be formatted with the help of HTML tags.

Maximum amount of pages that can be printed through batch printing of forms

Maximum amount of pages in one batch printing charge. The size of the number can depend on different factors such as server performance, number of different questionnaires, use of images in the questionnaires etc. (default value 5000 pages, maximum 30.000 pages).

Display of recognized form data

If activated, the checkboxes, whose values were transmitted to evasys, will be marked green in the PDF overview of the processed forms (accessible in the details of a survey). The green frames mark the data which is currently stored in the data base. Deletion of open questions, filter rules, verification etc. are considered.

Standard view VividForms Editor (SUB)

This option defines the standard view of a questionnaire in the VividForms Editor. The user can switch between the paper and online view at any time if the license allows.

VividForms Designer Demo Version (SUB)

If this setting is activated, then all active accounts within a subunit are allowed to start the demo version of the VividForms Designer.

2.5.13. Network Settings

Display value support link

Display text of the web link shown in the interface (default: evasys website).

HTTP link on support page

Target address of the web link shown in the interface (default: http://www.evasys.de/support)

HTTP redirection address

Redirection address for rejected access attempts.

IP address mail server

IP address or domain name of the mail server evasys should use for messaging functions.

If you use a secured mail service, you can add the character combination ssl:// or tls:// in front of the host name (ssl://<IP-address> bzw. tls://<IP-address>). Additionally, you have to switch the port of the mail server to port 465.

Port mail server

Port of the target mail server (Default: 25).

HELO to mail server

Greeting for the mail server, in this case the name of the mail server to be addressed. Ignored, impolitely, by most mail servers.

Authentication

Activates the authentication on the mail server. In most cases not necessary. You can choose between

- Basic (Login with user name and password)
- Gmail (Login via OAuth (Client ID & Secret))
- Microsoft 365 (Login via OAuth (Tenant ID, Client ID & Secret)).

User name

User name with which evasys should log in to the mail server (if authentication needed). In case of using OAuth please enter here the mail address of the linked account.

Password

Password with which evasys should log in to the mail server (if authentication is needed).

Tenant ID

If the login takes place via OAuth, please enter the tenant ID of the OAuth client here. This value is currently only used when connecting to Microsoft / Azure and is listed there as "Directory (tenant) ID".

Client ID

If the login takes place via OAuth, please enter the client ID of the OAuth client here.

Client Secrect

If the login takes place via OAuth, please enter the client secret of the OAuth client here.

Refresh Token

If the login is done via OAuth, please enter the refresh token for the OAuth client here. You must have created the refresh token by clicking here before.

Server root path

This setting defines the root path of the evasys web server. The path must end with a slash (/).

Maximum document size

Maximum size (in bytes) of an attachment or PDF template document. Please note that changing this value above 16MB requires resetting the database configuration max_allowed_packet.

Storing the IP address in the session

If activated, the IP address of every evasysuser will be stored in the session. For every additional user action within evasys the stored IP address is compared to the retransmitted. If the values differ, the session is terminated and the login screen appears. The security check prevents guessing a valid session ID and associated access evasys by third parties. However, guessing a valid and useful session ID even when disabled function is unlikely.

If users with the same IP address access evasys (network dependent), the IP address can be checked limitedly with enabled storage of the IP address.

If accessed evasys from a network that communicates with changing IP addresses with evasys, the storage of the IP address must be switched off. Otherwise, the login screen appears when working with evasys again with an error message because evasys cannot identify whether the session is still part of the same user, but the IP address has changed or a foreign user tries with the session to continue working.

2.5.14. System Security

Use CAPTCHAs

This function protects evasys against automated attacks. CAPTCHAs are pictures where characters (numbers or letters) are displayed in a way only recognizable by humans. They are used to distinguish between humans and machines. If CAPTCHAs are activated the user will be prompted to type in a CAPTCHA after several failed log-ins.

Number of failed logins before a CAPTCHA will be shown

Number of failed logins a user can have before a CAPTCHA will be shown to be typed in.

Observed period of time and blocking time

If a user has several failed logins during the period of time defined here s/he will be prompted to type in a CAPTCHA. At the same time the login screen will be blocked for the network address of the potential attacker for the period (in minutes) defined here. The blocking can be unlocked ahead of time by typing in the CAPTCHA correctly.

Restricted access

Activates/deactivates the restriction of access. When activated the evasys server checks the IP address of each inquiring computer for the following IP address domains.

Begin/End IP address domain participant online survey

First/Last permitted IP address for participants in an online survey. It is possible to store several IP addresses and/or IP address ranges by using the vertical bar „|“.

Example:10.2.59.0|10.2.60.0-10.2.61.255|172.16.2.0-172.16.0-172.6.2.255|

Begin/End IP address domain user

First/Last permitted IP address for users. It is possible to store several IP addresses and/or IP address ranges by using the vertical bar „|“.

Example:10.2.59.0|10.2.60.0-10.2.61.255|172.16.2.0-172.16.0-172.6.2.255|

Begin/End IP address domain for administrator

First/Last permitted IP address for the administrator. It is possible to store several IP addresses and/or IP address ranges by using the vertical bar „|“.

Example:10.2.59.0|10.2.60.0-10.2.61.255|172.16.2.0-172.16.0-172.6.2.255|

Enforce password policy

If activated, passwords can only be saved if they match the following password policy:

- Length: Min. 8 characters
- Characters contained: At least one capital letter, one small letter and one number
- Structure: Not more than two consecutive identical characters

This check takes place at each password generation. If the switch is deactivated, also insecure passwords can be stored.

Block Five-digit PSWD in Online Survey Invitations

If activated, this switch requires participants who access online surveys from a link in their email to enter a 14-digit password; the five-digit passwords used in former evasys versions (prior to version 7.0 Service Pack 1) are not allowed. This affects the direct link [DIRECT_ONLINE_LINK] as well as the placeholder for PSWDs. The display of PSWDs on PSWD cards, in the CSV export or in the header of hybrid questionnaires are not affected. Here it is still possible to enter five-digit PSWDs.
Activate this switch only if you can verify no survey invitations that require five-digit passwords are still open, otherwise participants will be blocked from the survey.

Generally block five-digit PSWDs for online surveys

If activated, five-digit PSWDs for online surveys are completely blocked within the system. Only 14-digit PSWDs are allowed. This affects email invitations with direct link (DIRECT_ONLINE_LINK], the display of PSWDs by means of placeholders in emails and in the header of hybrid questionnaires as well as the CSV export of PSWDs.

Please note that if you activate this switch, you will not be able to use PSWD cards, as PSWD cards only support five-digit PSWDs.

2.5.15. Maintenance

Debug mode

Activate/deactivate debug. This setting allows you to find defective data and other problems. If necessary you will be asked by support to activate this.

In normal operation the debug mode should be turned off.

Because an activated debug mode can slow your system down, the administrator, after login, is informed of all possible scenario regarding this.

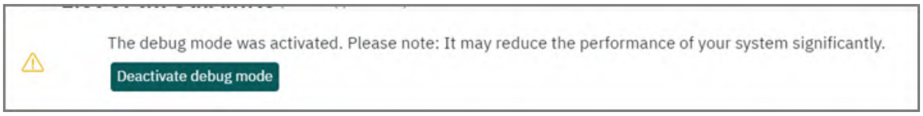


Figure 795: Warning Message Debug Mode

If you click on [Deactivate the debug mode], the debug mode in the configuration is automatically deactivated. evasys informs you of the deactivation of the debug mode.

Changing the survey ID (SUB)

If activated this option allows changing the survey ID. You can then change the survey ID in the details of a survey as long as the survey does not have any results (questionnaire returns). This option is available only for the hard copy procedure and for cover-sheet surveys.

Changing the survey ID can be a help if, for example, wrong questionnaires have been distributed. Please only use this option in an emergency and if you exactly know what you are doing. In case of doubt please ask your support.

Logging of system sessions

The logging of system sessions provides an overview of the users and participants of online surveys currently logged into the system. This function gives an insight into the current level of utilization of the system.

Processes creating high load on the server such as large reports, batch printing etc. can be performed at times in which the server is not fully occupied.

Display information of system sessions in the menu

Display of the information concerning active system sessions in the menu of the (Subunit) Administrator. This setting is only relevant when logging of system sessions is activated.

Measuring of performance values

As a means of measuring performance values a graphic illustration of the system workload of the evasys server can be displayed at different times. The diagram can also be adjusted for different periods.

The performance measurement measures the response time on the server and does not consider any limitations by the network.

Yellow limiting value for performance diagram

Defines the lower limiting value in seconds for the yellow zone of the performance diagram. The area beneath is displayed in green.

Red limiting value for performance diagram

Defines the lower limiting value in seconds for the red zone of the performance diagram. The area beneath is displayed in yellow.

Maintenance mode

The maintenance mode allows technical operations (such as updates) to be carried out by the administrator without hindering any current operations. When activated, no further users can log into the system. Participation in online surveys is also suspended.

Once activated, a warning message informs the administrator that the maintenance mode is activated and that users already logged into the system can continue operating.

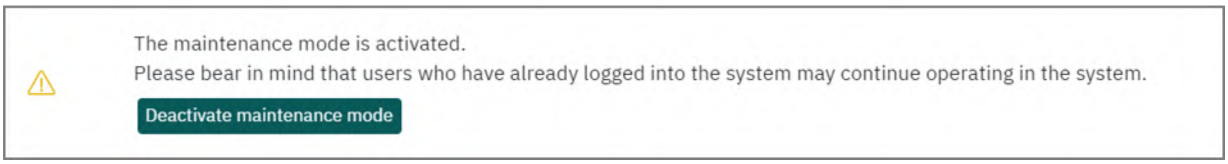


Figure 796: Maintenance Mode: Activated Warning Message for the Administrator

Users who are already logged into the system receive a warning message too, and are requested to finish their work and log off the system as soon as possible so that maintenance operations may be carried out.

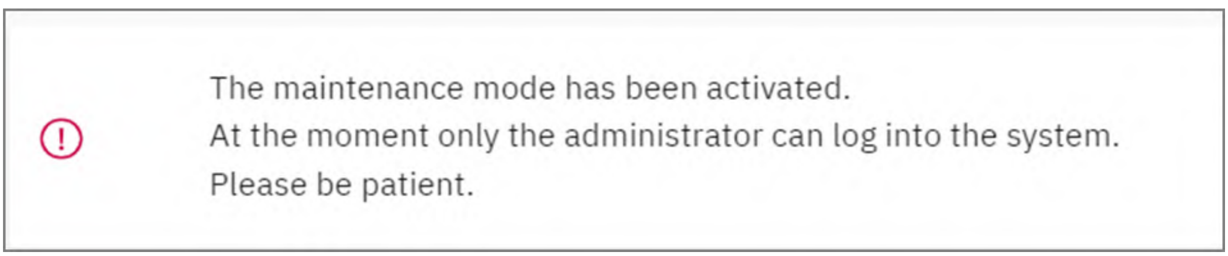


Figure 797: Maintenance Mode: Activated Warning Message for Active Users

Participants of online surveys who are already logged in may finish their questionnaire. New participants cannot log in. They also receive a warning message.

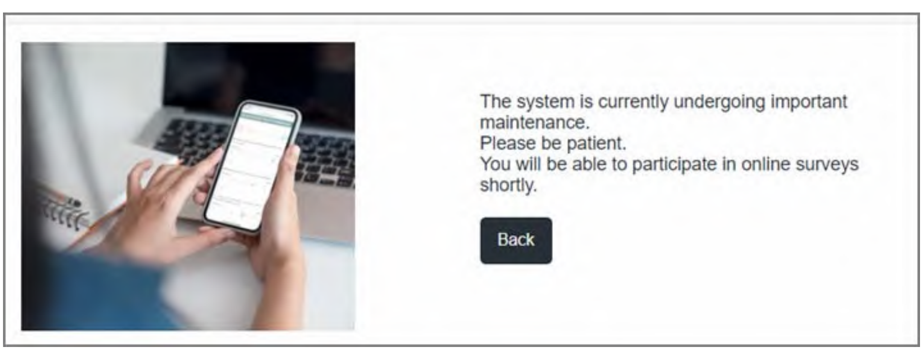


Figure 798: Maintenance Mode: Activated Warning Message for Online Survey Participants

The information messages for users and online survey participants can be adapted by the administrator, if necessary. In the menu “System Settings / Text Templates” two corresponding templates are available (“evasys: Note on the evasys login page in maintenance mode” and “evasys: Note on the online survey login page in maintenance mode"). For further information compare chapter D 2.1.4. "EvasysClass Climate texts".

With the aid of the user statistics ("Users logged in/Online surveys") the administrator can oversee which and how many users are still logged into the system. With the help of the email function integrated in evasys all users who are active in the system can be contacted (see chapter D 1.2. "Writing Email"). As soon as the last user has logged off, maintenance operations can be started. On completion, the maintenance mode may be deactivated.

Note:
By activating the maintenance mode, the VividForms Reader is not automatically stopped. Before installing an update, please ensure that no forms are being processed, and, if necessary, terminate the VividForms Reader.

Automatic update check

This option determines the interval at which the system searches for automatic updates after the administrator has logged in.

When checking for updates, data is transferred from the evasys system to the update server. The following information is included: the customer name, the license key, the current evasys version, the default system language, the current configured language, the product derivative, the content of the configuration setting "server root path", the ID of the supplier as well as a unique ID for the update check process itself, which is added for reasons of security. All this information is SSL encrypted and used solely for technical purposes. No personal data or captured data from your system is transmitted. If you do not agree to the transfer of the above mentioned information, simply deactivate this function. Independent of this function, you will be informed of available updates through other channels.

0 = deactivated
1 = every 30 days
2 = every 7 days
3 = after each login

CSV export for blackening degrees in the verifier

If this function is activated, the verifier can export the blackening degrees of all recognized fields within a batch as a CSV file in the batch view.

3. Support

3.1. Evasys Website and Support Area

When logged in as an administrator in evasys, – via the main menu "System Information" – on the sub-menu's left-hand side you will find the option "evasys Website".

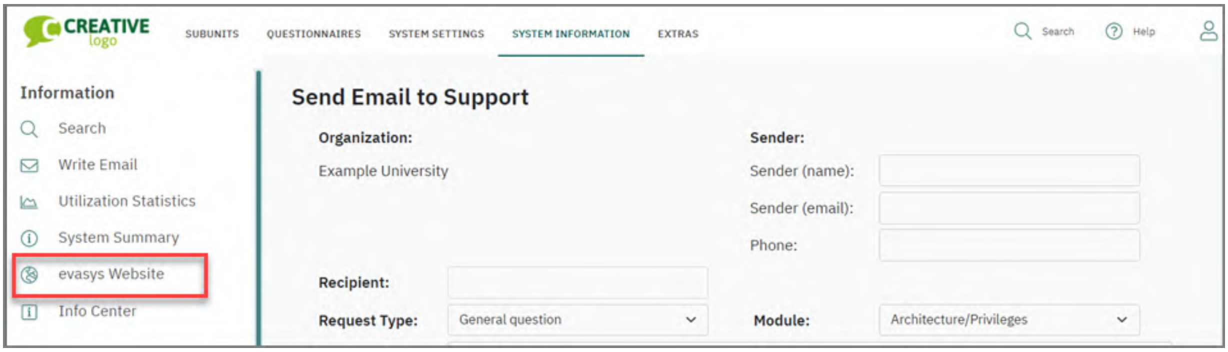


Figure 799: Link to the evasys Website as Administrator

If you click the option „evasys Website“, the evasys website opens. Via the menu “International/Customer Services/Support request” you can open a support case.

3.2. Email to the Support Department

In the main menu “System Information” you will find the option “Send email to support” in the sub-menu on the left. If you have a query addressing evasys GmbHsupport department, click on this option.

Enter your name as well as your email address in the field “Sender”. The selection list “Request Type” provides you with following options:

- General question: You have a question regarding evasys.
- Support inquiry: You have a problem with evasys and require assistance.
- Feature request: You have a suggestion for improvement or an idea to develop evasys.

Choose one of these query types and then choose the appropriate category under “Module”. In the fields “Subject” and “Your message” you can type your message.

Below the message area you can add up to three attachments: click on [Browse…], select one file and click on [Add]. The attachment should not be larger than 1 MB. After another click on [Next] a summary of your message will appear. Some pieces of information about your evasys will be included, such as the version number. Then click on [Send email] to send the email.

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