This document provides basic instruction on the Evaluation process.

The Evaluation process is comprised of three primary objects:

- ***Evaluation Question Bank***
- ***Evaluation Template***
- ***Evaluations***

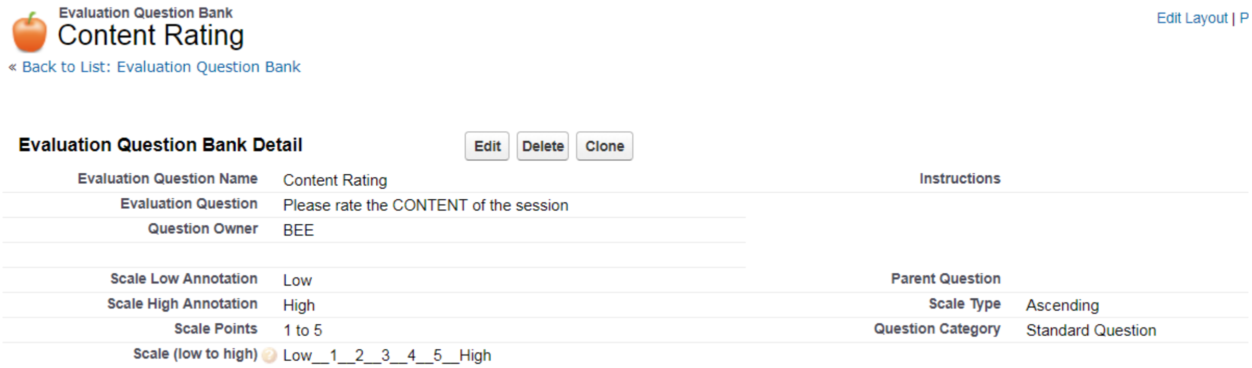
Evaluation Question Bank

Evaluation Question Bank provides the ability to create and reuse evaluation questions.

Adding new questions*:*

Many BEE Salesforce users have the ability to create new Evaluation Questions. If you do not have this ability, see your team's Salesforce primary point person.

1. Search to determine if the question already exists in the system.
2. If the question does not already exist, then go to the Evaluation Question Bank tab and click 'New'.
3. Fill out the fields as follows:
    - Evaluation Question Name – the unique name for the record.
    - Evaluation Question – how the question will appear on the evaluation form
    - Question owner – which functional area owns the question (future possible use)
    - Instructions – any additional information about the question
    - Scale Low Annotation – value for the low end of a scale; values might include "Low", "0", "Dissatisfied", "Not useful", etc.)
    - Scale High Annotation – value for the high end of a scale; values might include "High", "5", "Very Satisfied", "Very Useful", etc.)
    - Scale Points - the range of points (0-5, 0-10)
    - Scale (low to high) – uses the previous fields to build how the scale will display on the evaluation form
    - Parent Question – a related question
    - Scale Type –Scale Type value migrated from Pivotal
    - Question Category – select a category from the list of category types
4. After filling out all required and relevant fields click 'Save'.



Evaluation Question Bank
Content Rating
« Back to List: Evaluation Question Bank

Edit Layout | P

Evaluation Question Bank Detail Edit Delete Clone

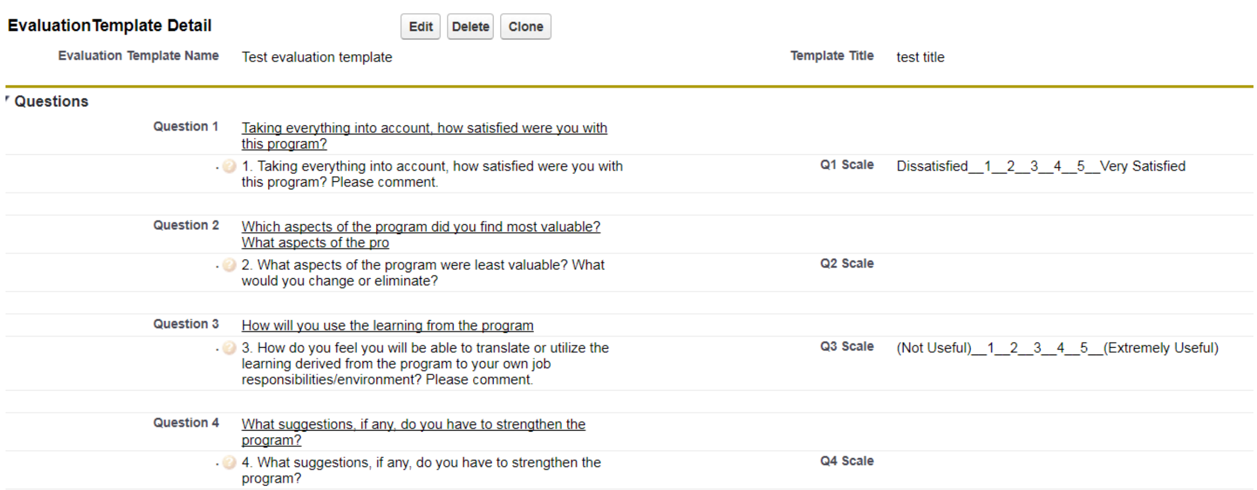
Evaluation Question Name	Content Rating	Instructions	
Evaluation Question	Please rate the CONTENT of the session		
Question Owner	BEE		
Scale Low Annotation	Low	Parent Question	
Scale High Annotation	High	Scale Type	Ascending
Scale Points	1 to 5	Question Category	Standard Question
Scale (low to high)	Low__1__2__3__4__5__High		

Evaluation Template

Evaluation Templates provide the ability to create (reusable) templates with up to 15 questions. Evaluation Templates use the evaluation questions stored in the Evaluation Question Bank. Evaluation Templates can be associated with BEE Offerings and BEE Offering Sessions.

Adding a new Evaluation Template

1. Search to determine if the template already exists in the system
2. If the template does not exist, then go to the Evaluation Template tab and click 'New'.
3. Enter an Evaluation Template Name and optional Title
4. Using the Question lookup field, choose the questions from the Evaluation Question Bank.



EvaluationTemplate Detail Edit Delete Clone

Evaluation Template Name	Test evaluation template	Template Title	test title

Questions

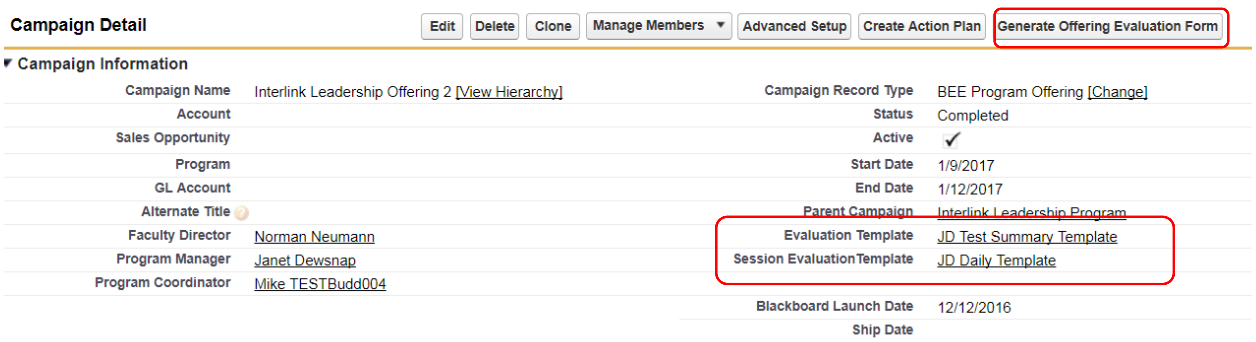
Question 1	Taking everything into account, how satisfied were you with this program?		
	1. Taking everything into account, how satisfied were you with this program? Please comment.	Q1 Scale	Dissatisfied__1__2__3__4__5__Very Satisfied
Question 2	Which aspects of the program did you find most valuable? What aspects of the pro		
	2. What aspects of the program were least valuable? What would you change or eliminate?	Q2 Scale	
Question 3	How will you use the learning from the program		
	3. How do you feel you will be able to translate or utilize the learning derived from the program to your own job responsibilities/environment? Please comment.	Q3 Scale	(Not Useful)__1__2__3__4__5__(Extremely Useful)
Question 4	What suggestions, if any, do you have to strengthen the program?		
	4. What suggestions, if any, do you have to strengthen the program?	Q4 Scale	

5. Click 'Save'. Note: The Question will be redisplayed with the question number and the Scale as they will appear on the Evaluation Form.

Associating a template to an Offering / Session

Evaluation Templates are associated with BEE Offering and BEE Offering Sessions.

1. Navigate to the Campaign tab and find the desired Offering record.
2. Select an Evaluation Template using the lookups in the Evaluation Template and if applicable, Session Template fields.
3. Click Save


Campaign Detail — Edit | Delete | Clone | Manage Members | Advanced Setup | Create Action Plan | Generate Offering Evaluation Form

Campaign Information

Campaign Name	Interlink Leadership Offering 2 [View Hierarchy]	Campaign Record Type	BEE Program Offering [Change]
Account		Status	Completed
Sales Opportunity		Active	✓
Program		Start Date	1/9/2017
GL Account		End Date	1/12/2017
Alternate Title		Parent Campaign	Interlink Leadership Program
Faculty Director	Norman Neumann	Evaluation Template	JD Test Summary Template
Program Manager	Janet Dewsnap	Session Evaluation Template	JD Daily Template
Program Coordinator	Mike TESTBudd004		
		Blackboard Launch Date	12/12/2016
		Ship Date	

Printing an Offering Evaluation Template Form

1. Navigate to the Campaign tab and find the desired Offering
2. From the Offering record, click the [Generate Offering Evaluation Form] Button. This will launch Conga Composer and will build the Evaluation Form as a Word document for downloading and printing.

Printing a Session Evaluation Template Form

1. Navigate to the Campaign tab and find the desired Offering
2. Using the Sessions Related List on the Offering, select the Session
3. From the Session record, click the [Generate Session Evaluation Form] Button. This will launch Conga Composer and will build the Evaluation Form as a Word document for downloading and printing.

Evaluations

Evaluations hold the evaluation responses from Offering and Session participants.

How Offering Evaluation records are created…

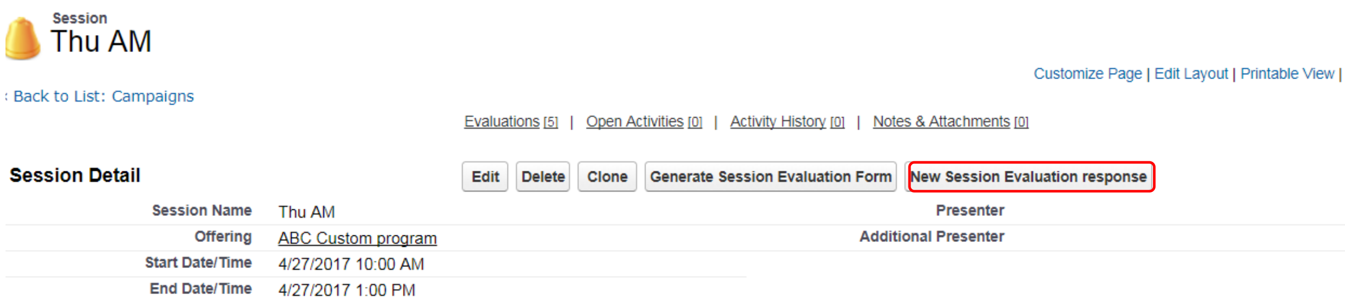
Offering Evaluation records are automatically created for each Offering Participant when the Participant's Campaign Member record status is updated to "Attended". The Evaluation record is essentially a blank form containing the evaluation questions from the template and fields where the responses to each question can be entered.

See the Campaign Management Quick Reference Guide for more details on updating Campaign Members.

How Session Evaluation records are created

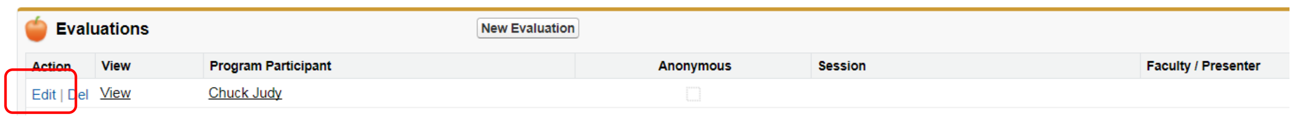
Since participation is not track per session, the Session Evaluation records are created manually as needed.

1. Navigate to the Offering's Session record
2. Press the [New Session Evaluation Response] to generate a new Evaluation record. The new record will appear at the top of the Evaluations Listview.



Entering Offering Evaluation Responses

1. Search for the Offering by name or navigate to the Campaign tab to find the Offering.
2. Using the Evaluations related list on the Offering, locate the participant's Evaluation record.



3. Click Edit to open the participant's Evaluation record
4. Enter the participant's responses
5. Click Save.

Anonymous Evaluations

If a participant wishes to keep his/her responses anonymous:

1. Navigate to the appropriate Evaluation record.
2. Enter a space in the Program Participant field to remove the participant's name
3. Click the Anonymous box
4. Click Save