Web-Based Evaluations

Evaluation Template Formatting Manual

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Problem:

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# Introduction

Users of the Web Evaluation software with the role ‘Evaluation Admin’ can set up evaluations for the company/organization. These evaluations are created using a Microsoft Excel file as a template. The file will be uploaded and is responsible for the format, content, and appearance of the evaluation form for all assigned groups. The evaluation excel file must follow the correct format to be interpreted by the software. This document will outline in detail how these template documents should be formatted for use in the Evaluation software.

# Creating the Excel template for Evaluations

The excel file to be used can be created through any means desired. A new worksheet can be created from scratch, or an existing template can be customized to meet your needs. The file can have any filename, but the extension must be “.xlsx”, a standard Microsoft Excel Worksheet.

The worksheet should contain only one sheet, and all information should be contained within that single sheet. To avoid errors, please make sure that there is no extraneous text within the document that does not follow the evaluation format. Detailed guidelines regarding the format are provided below.

# Template formatting guidelines

The document will follow a set of guidelines to produce the desired evaluation form. Information in the document should be designed around specific keywords which can be interpreted by the software. Keywords must be typed exactly as they appear and in uppercase text. Sizing, colors, blank rows, and other formatting in the document can be included as desired to increase readability. Styling attributes and spacing will be ignored by the software.

## Keyword Definitions

* **FILE TYPE** – Indicates to the software that the file is intended to be used as an evaluation template. For all evaluation files uploaded, the value should be ‘EVALUATION’.
* **ID** – A name and/or number assigned to this document and all evaluations created from it. Must be unique for each evaluation uploaded by an organization.
* **TITLE** – Title of the evaluation
* **TITLE DESCRIPTION** – Description of the evaluation
* **DROPDOWN OPTIONS** – A list of values corresponding to the desired option names for all dropdown questions. Do not include N/A in this list of options.
* **DROPDOWN VALUE** – A list of integer values which assigns a point value to the previously defined ‘DROPDOWN OPTIONS’. These two keywords should have an identical number of values.
* **DROPDOWN INCLUDE N/A** – Determines if N/A should be listed as an option for dropdown questions. Valid values are ‘TRUE’ or ‘FALSE’.
* **COMPUTE RANGE NAME** – A list of values corresponding to the desired scoring rank names which will be used in compute sections.
* **COMPUTE RANGE SCORE MIN** - A list of number values (decimal numbers permitted) which assigns a minimum score threshold to the previously defined ‘COMPUTE RANGE NAME’. These two keywords should have an identical number of values.
* **COMPUTE RANGE SCORE MAX** - A list of number values (decimal numbers permitted) which assigns a minimum score threshold to the previously defined ‘COMPUTE RANGE NAME’. These two keywords should have an identical number of values.
* **COMPUTE TOTALS** - Determines if the evaluation totals and averages should be auto-generated in the final evaluation analysis document. Valid values are ‘TRUE’ or ‘FALSE’.
* **SECTION** – Defines the beginning of a section and the value for the sections name.
* **SECTION DESCRIPTION** – Description of the section
* **SECTION TOOL TIP** – Value defines the substring in ‘SECTION DESCRIPTION’ value where the tooltip mouse hover will be activated
* **SECTION TOOL TIP VALUE** – Defines the text displayed in the mouse hover tooltip.
* **SECTION TOOL TIP MARKER** – Determines the formatting of text that contains the tooltip. Valid values are ‘DASHED UNDERLINE’, ‘SOLID UNDERLINE’, and ‘INFO ICON’.
* **PRE-LOAD ROW <#>** - A type of question where the responses is pre-filled through the database. Should contain basic identification questions such as name, employee ID, etc.
* **QUESTION** – Question to be asked
* **QUESTION DESCRIPTION** – Additional description of the question
* **QUESTION TOOL TIP** – Value defines the substring in ‘QUESTION’ value where the tooltip mouse hover will be activated
* **QUESTION TOOL TIP VALUE** – Defines the text displayed in the mouse hover tooltip.
* **QUESTION TOOL TIP MARKER** – Determines the formatting of text that contains the tooltip. Valid values are ‘DASHED UNDERLINE’, ‘SOLID UNDERLINE’, and ‘INFO ICON’.
* **COL** **<# 1, 2, or 3> -** Used for questions to define the position of the question within the section.
* **SINGLE LINE TEXT –** Question type where a single line text box is used for the response
* **PARAGRAPH TEXT-** Question type where a paragraph text box is used for the response
* **RADIO BUTTON –** Question type where radio buttons are used for the response (single selection)
* **CHECK BOX –** Question type where check boxes are used for the response (select one or more)
* **DROPDOWN –** Question where a dropdown box with options is used for the response (scored responses)
* **COMPUTE –** Declares that a question should use responses to dropdown questions to compute a section score.
* **REQUIRED –** Indicates that a question must be answered before submitting.
* **CONTROLS QUESTION –** Indicates that a BOOLEAN Y/N RADIO BUTTON question controls the appearance of another question.
* **CONTROLLED –** Indicates that a question’s visibility is controlled by another question

## Content Layout

### Title and Required ID

The **FILE TYPE** and **ID** keywords should appear at the top of the document. Below that are **TITLE** and **TITLE DESCRIPTION**. For all the above, the keyword should appear in column A and the value should be placed next to it in column B.

Table

Description automatically generated

Figure 1: Shows content that should be placed at the top of the worksheet.

### Scoring – Required Setup

Any evaluation which contains dropdown questions and compute sections must have the following keywords defined at the top of the document. (Note: dropdown options should be used for scored questions only.). Define the following keywords in column A in the given order: **DROPDOWN OPTIONS, DROPDOWN VALUE, DROPDOWN INCLUDE N/A, COMPUTE RANGE NAME, COMPUTE RANGE SCORE MIN, COMPUTE RANGE SCORE MAX, COMPUTE TOTALS.** For **DROPDOWN INCLUDE N/A** and **COMPUTE TOTALS,** place TRUE or FALSE in column B. For the remaining keywords, multiple values can be listed starting in column B and columns to the right.

Table

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Figure 2: Show the required keywords and layout of DROPDOWN and COMPUTE setup information.

### Preload Section

The pre-load section should be the first section in the document. Like normal sections, the preload section should contain **SECTION** and **SECTION** **DESCRIPTION** first. The keyword should appear in column A and the value should be placed next to it in column B.

Below that, pre-load questions should be placed in rows, with two columns per row. Column A contains the keyword **PRE-LOAD ROW <#>**. Note that **<#>** should be replaced with an integer. Rows should be numbered sequentially starting with number 1. Column B should contain **COL 1** and Column D should contain **COL 2** respectively. The values for each pre-load question should be placed in Column C and D. Note: tooltips, question descriptions, and response types should not be included in the preload section. The values in Preload must correspond to the columns listed in the Upload Users Excel document.

Table

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Figure 3: Shows an example of a valid preload section.

### Normal Sections

All question in an evaluation must be contained within a section. Each section should begin with the **SECTION** keyword. Optionally, the **SECTION** **DESCRIPTION** keyword can be included and should be directly below **SECTION**. The keywords should appear in column A and the value should be placed next to them in column B.

Below that, the questions should be inserted. The **QUESTION** keyword should be placed in column A, the **COL <#>** keyword in column B, and the question text value in column C. Replace <#> with the column number, between 1 and 3 as shown in Figure 4.

The response to each question is defined in Column D using the appropriate keywords. These Include **SINGLE LINE TEXT, PARAGRAPH TEXT, RADIO BUTTON, CHECK BOX,** and **DROPDOWN.** Radio button questions and check box questions should have the desired responses listed in the columns right of the question type. Each cell should contain only one response option. Radio buttons where the only options are Yes/No should use the keyword **BOOLEAN Yes / No** in column E as the only response option. Text based responses and dropdown questions should not list any response options. Dropdown options are defined at the top of the document. For **CHECK BOX** questions, N/A can be included as an option. Checking N/A on the evaluation form will disable all other options while checked.

In column A, three other optional keywords can be included. These are **REQUIRED**, **CONTROLLS** **QUESTION**, and **CONTROLLED**. Note that questions cannot be both **REQUIRED** and **CONTROLLED.** The controlling question feature works in sequential order as listed in the excel document. When a question is marked **CONTROLLS** **QUESTION,** the controlling state will be applied to the next question which contains the **CONTROLLED** keyword**.** A controlling question can control only one question. For example, in figure 4, the question on row 40 controls the question on row 44. **COMPUTE** and **CHECK** **BOX** questions are not eligible to be controlled.

Graphical user interface, text, application

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Figure 4: Example of a section in an evaluation.

### Compute Sections

Compute sections should be included if a standardized score is desired. Compute sections will calculate the score given by the **DROPDOWN** question responses in each section.

Compute sections are defined as their own section. The **SECTION** keyword in column A should have the value **OVERALL: <Section Name>** in column B, where <**Section Name>** matches the text given for the section that the questions are located as shown in Figure 5 and 6. Compute sections should contain a **QUESTION** keyword in column A, the name of the compute question in column B, and the keyword **COMPUTE** in column D. Only one compute question should be included in each compute section. Other non-scored questions can be included in compute sections if desired.

The score information will become available after the evaluation has been filled out and submitted. N/A or unanswered answers to dropdown questions will not be included in the score.

Text

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Figure 5: Normal section declaration.

A picture containing text

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Figure 6: Compute section declaration which corresponds to the section in Figure 5.

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### Tooltips

Section and Questions can have tooltips which will appear on mouse hover. These are optional and can be included to give the evaluator more information about a question or section. Any question or section can have an associated tooltip. Tooltip are defined using three keywords. These are **<SECTION or QUESTION> TOOL TIP**, **<SECTION or QUESTION> TOOL TIP VALUE** and **<SECTION or QUESTION> TOOL TIP MARKER.**

The keywords should be placed in column A under the **SECTION**, **SECTION DESCRIPTION**, **QUESTION**, or **QUESTION DESCRIPTION** keywords. The **TOOL TIP** describes where the tool tip mouse hover will be activated. For sections, the value of this should match or be a substring of **SECTION DESCRIPTION.** For questions, the value of this should match or be a substring of **QUESTION**. The keyword **TOOL TIP VALUE** defines what tool tip text will be displayed on mouse hover. Figure 7 shows this in detail.

Text that has a tool tip enabled will be identifiable by a dashed underline by default on the evaluation form page, indicating that there is more information available. To customize this, Use the keyword **<SECTION or QUESTION> TOOL TIP MARKER.** The valid values for this keyword are “DASHED UNDERLIN”, “SOLID UNDERLINE”, and “INFO ICON”.

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Figure 7: Proper use of Question and Section Tool Tip keywords.

### Misc. Guidelines

* + - Each evaluation can contain any number of sections (exceptions include Pre-load sections where there can only be one)
    - The first section defined should be a pre-load section.
    - Each compute section should correspond to only one section
    - Each normal section can contain any number of questions
    - Radio buttons should be used over dropdowns if no scoring computation is desired
    - Use check boxes only when multiple responses are possible
    - The evaluation form is created in the same order that was listed in the excel document. Organize sections and questions in the manner that they should appear in the evaluation form.
    - Use a maximum of two columns in the preload section.
    - Use a maximum of three columns in normal sections with questions.
    - Section/Question descriptions and tooltips are optional.
    - Each section must begin with the SECTION keyword
    - Each question must begin with the QUESTION keyword

# Uploading the Excel file template for Evaluations

After creating the excel document, it can be uploaded and used for evaluations. The following steps outline this process:

* Login to the Web Evaluations system as an ‘Evaluation Admin’ user
* Navigate to the “Evaluation Forms” tab presented in the navigation bar
* The “Upload New Evaluation” dialogue is expanded be default.
* Click on “Choose File”
* Navigate to the location where the file is stored on your computer
* Select the file and click open, or double click the file
* Click the “Import” button
* If the upload was successful, you will be presented with a success message and a preview of the generated evaluation form.
* Ensure that the evaluation form appears as desired. If any changes are desired, click “Cancel”, make changes to your file, and follow the above steps to upload it again.
* Once the evaluation has been previewed, click “Save Evaluation Template” to save the evaluation in the database.

If any errors should be present in your template document, the software will alert you accordingly. Upon uploading the document as an evaluation, the software may present you with Error messages, Warning messages, and/or a Success message. Error messages are mistakes in the document that are critical and must be resolved. Users will not be permitted to upload the evaluation file if any errors are encountered. Warning messages are non-critical errors, typically relating to undefined optional keywords or other formatting information. In many cases, missing non-critical attributes will be automatically set to some default state. File with errors can still be previewed and saved.

If error or warning messages are present, the user will be presented with an option to download the file which was uploaded which will have a new sheet appended which will contain any errors that were encountered.

Take care in ensuring that your evaluation form appears as desired. Evaluations can be deleted after upload, however, only before any groups have been assigned to the evaluation form. After such, the option is disabled until the groups are un-assigned from the evaluation form or until the groups are archived.