INSTRUCTORS’ GUIDE
TO COURSE EVALUATIONS

Before Getting Started

Sometimes learning a new system can be frustrating, especially a system that has many built-in options. This guide will help you through the process. If you want individualized help, log into the system and click the “Request Help” tab, which is second down on the left side menu. This will send a request directly to the Office of Institutional Research.

New Faculty

If you are a new faculty member and just want the basic evaluation to recur automatically every term, wait until you are ready to turn on your evaluations and then go to the student evaluation website and click “Activate All Evaluations Now”. This is the Easy Activation of All Evaluations option. You won’t have to do anything else except return after the semester has closed and review your results. This method will continue producing evaluations automatically each term until you return and change the activation method. This guide will tell you how to do that.

Returning Faculty

If you have used the course evaluation system before and want to customize your evaluations, each method is discussed in detail in this guide. Customization options include:

- Adding your own questions (target to do this before mid-term)
- Creating a mid-term survey for immediate feedback
- Changing the evaluation schedule
- Using a manual process that doesn’t rely on scheduling.

It’s not as complex as it looks at first glance and the following guide includes screen shots to help you through anything that is confusing. Again, if you want individualized help, log into the system and click the “Request Help” tab, which is second down on the left side menu. This will send a request directly to the Office of Institutional Research.

Graduate Instructors or Teaching Assistants

If you are a teacher of record in the course (i.e., listed in iRoar as an instructor and independently responsible for your course grades) the evaluation program will work like it does for faculty.

If you are a teaching assistant (meaning you are not listed as an instructor in iRoar and you are not responsible for grades), you may receive a different message asking you to contact your GTA coordinator. Sometimes this role changes, so if the coordinator doesn’t know how to help you set up your GTA course evaluations, have him or her contact the OIR office at welbor4@clemson.edu.
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LOGGING ON

Instructor Access

https://courseval.app.clemson.edu/index.php?it=i

Use this link to access the instructor interface, where instructors can create course evaluation surveys and view their results.

Student Access

https://courseval.app.clemson.edu/index.php?it=s

Tell your students to use this link to access the student interface, where they can fill out your course evaluation.

Department Chair Access

https://courseval.app.clemson.edu/index.php?it=d

Use this link to access the departmental interface, where department chairs can view department-wide course evaluation results and manage the department question set.

GTA Coordinator Access

https://courseval.app.clemson.edu/index.php?it=g

Use this link to access the GTA Coordinator interface, where GTA coordinators can set up course evaluations for teaching assistants in their department, view department-wide GTA evaluation results, and manage the departmental GTA evaluation question set.
GETTING STARTED

This guide will tell you everything you need to know about making, customizing, and managing course evaluations. Read this introductory section to get a basic understanding of Clemson’s course evaluation system and to help you decide which of the many available options you should choose for making your course evaluations.

WHAT DO INSTRUCTORS NEED TO DO?

• In order for students to be able to complete evaluations for your courses:
  o You will need to create an evaluation for each course.
    ▪ Choose one of the Methods For Creating Evaluations to create your evaluations.
  o Once your course evaluations have been created, you must make sure that they are activated in order for students to take your evaluations.
    ▪ To check to make sure you have set everything up correctly, see instructions from Check Readiness of All Evaluations.

METHODS FOR CREATING EVALUATIONS

This guide gives step-by-step instructions for 3 different methods for creating your course evaluations. There are advantages and disadvantages to each.

• “The Easy Button”
  o Prep Work: The easy button is the quickest and easiest way to create and activate evaluations for all of your courses.
  o Customizability: This method does not allow you to customize your evaluations. It does not give you the option to add your own questions, or to adjust when the evaluation will be active.
  o Maintenance: If you use this method, it will automatically set up your evaluations for future terms.
  o Instructions: Follow instructions in the section Easy Activation of All Evaluations.

• Manual Method
  o Prep Work: This method is more complicated to set up than the “Easy Button,” but is still relatively simple. However, this method requires you to set up evaluations one at a time, which can be time consuming if you are teaching many course sections.
  o Customizability: This method allows for fully customized evaluations.
  o Maintenance: If you use this method, you will have to create your course evaluations again each term.
  o Instructions: Follow instructions in the section Manual Method:

• Automation Rules
  o Prep Work: This method is the most complicated to set up. However, this method allows you to create many evaluations at once, which can save you time if you have many course sections.
  o Customizability: This method allows for fully customized evaluations.
  o Maintenance: If you use this method, it will automatically set up your fully customized evaluations for future terms.
  o Instructions: Follow instructions in the section Automation Rules:
WHAT CAN BE CUSTOMIZED IN COURSE EVALUATIONS?

All instructors can control who has access to certain parts of your evaluation results. If you set up your evaluations using the Manual Method: or Automation Rules:, you can also customize (1) the questions that appear in your course evaluations and (2) when the evaluations are available for students to take.

- **Evaluation Questions**
  - The University question set appears in all end-of-term course evaluations.
  - Department Questions
    - You can decide whether or not to include the department’s question set in your evaluation.
  - Instructor Question Sets
    - You can design your own question sets to include in your evaluations, to get feedback on questions specific to your course.
    - You can include another faculty member's' instructor question set in your evaluation, and compare results between instructors.
    - See instructions from Instructor Question Sets.

- **Activation Settings**
  - Activation & Deactivation date
    - You can decide the date range that the evaluation will be available to students. For example, you can make it active for just one day, for 3 weeks, or for the whole semester.
  - Daily availability
    - You can decide the daily window of availability which dictates when students can take the evaluation while it is active. For example, you can make it available daily from 12:05am – 11:55pm, from 8am – 6pm, or just during a specific class period.
  - Activation Method
    - You can schedule your evaluations to automatically activate on specific days, or you can elect to manually activate the evaluations.
    - You can elect to not activate evaluations, if you feel a course does not require a student evaluation. Instructors often use this when they have a doctoral or master's research course with one or two students or when they are a team teacher for a course but did not spend much time in the classroom.

- **Access to Results**
  - Your department chair is automatically allowed access to the summary statistics from University questions (and from department questions, if you choose to include them in your evaluations).
  - You get to decide whether your department chair can access:
    - Written responses to University & Department open-ended questions.
    - Summary statistics from your instructor question sets.
    - Written responses to open-ended questions in your instructor question sets.
  - See instructions from Controlling Access to Evaluation Results.
This section outlines the quickest and easiest way to create and activate all of your course evaluations at once. Note that using this method limits your ability to customize your evaluations.

- Make sure you want to use the "Easy Button" before pressing it. Read this whole page for a full description of what the button will do.
- Logging On to the instructor interface with your Clemson username and password.
- Click on the “Activate All Evaluations Now” button.

This button will activate evaluations for all of your courses in the current term, making them available to students from when you push the button until the end of the semester.

Certain features of the evaluations produced by this button will depend on your current settings.

- If you have never set up any custom settings for your course evaluations:
  - All of your evaluations will be created based on the default settings.
  - The evaluations will only include University and Department questions.
  - The evaluations will be available to students from 6am-11:30pm every day.
  - Using this button will also set up an automation rule to create and activate your course evaluations for future semesters based on the default settings.
    - In future semesters, your course evaluations will be available to students from 6am-11:30pm every day for the last 3 weeks of the term.
    - The evaluations will only include University and Department questions.
- If you have already created any evaluations this term or if you have any automation rules in place:
  - Evaluations for all of your courses will be activated from when you push the button till the end of the term.
  - Any evaluations that you have already created for the current term will stay as you created them, except that the activation start & end date will be overridden.
  - This includes all created evaluations, even if you had turned off. The “Activate All” button will make all evaluations be open from then until the end of the term.
  - If you have an automation rule set to kick off evaluations later in the term or that have already closed, they will be opened immediately and remain open until the end of the term. Extra questions included in the automation rule will still be included.
  - Any course without an evaluation for the current term and that has no applicable automation rule will be created according to the default settings.
    - The evaluation will only include University and Department questions.
    - The evaluation will be available to students from 6am-11:30pm every day.
  - If you don’t already have one, this button will create a default automation rule.
    - In future semesters, any of your courses that are not covered under another automation rule will be created and activated according to default settings.
      - The evaluations will be available to students from 6am-11:30pm every day for the last 3 weeks of the term.
      - The evaluations will only include University and Department questions.
MANUAL METHOD:
SET UP EVALUATIONS INDIVIDUALLY

Use these instructions to create customized course evaluations for each of your courses individually. If you use this method, you will have to create the course evaluations again each term.

CREATE AN EVALUATION

- If you want to include a custom instructor question set in an evaluation, get your question set ready before creating the evaluation. See section called Instructor Question Sets.
- Click “Manual Creation and Activation of Evaluations” on the side menu.

- Select the desired course from the drop-down menu and click “Make End-of-Term Evaluation”.

- Choose your preferred activation method and click “Save and Continue.”

  - **Scheduled Activation** is the default. This method lets you choose a start date and end date, and the evaluation will automatically be activated during that timeframe.
  - **Manual Activation** means you will need to return to the Instructor Interface page to manually activate the evaluation when it is time.
  - **Do Not Activate** means this course will not have an evaluation for this semester.

1 If there is no “Make End-of-Term Evaluation” button, this means that an end-of-term evaluation has already been created. For instructions on how to review an existing evaluation and/or make changes, see Editing Existing Evaluations.
• Choose what questions to include, and click “Save and Continue.”

![Include Questions](image)

- University questions are always included.
- Check or uncheck the box to indicate whether you want to include department questions.
- If desired, select a question set from the dropdown menu to include one of your instructor question sets.

• If you chose the Scheduled Activation method, choose an activation date/time and a deactivation date/time, and click “Save and Continue.” The default range allows the evaluation be active for the last 3 weeks of the term.

![Activation Schedule](image)

• Choose the daily availability for the evaluation and click “Save and Continue.” The default times are set to avoid scheduled site maintenance.

![Daily Activation Schedule](image)

• The evaluation is complete. The page will show your evaluation’s activation settings and a preview of the survey.

![Evaluation](image)

*Note:* If for some reason this process is interrupted and isn’t completed, the evaluation will show as in process or incomplete and the easiest thing to do at that point is to remove the evaluation and start over.

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2 See section called *Instructor Question Sets* for instructions on how to create your own question sets.
EDITING EXISTING EVALUATIONS

If a course evaluation has been created for the current term, you can preview the evaluation and make any necessary changes from the “Manual Creation and Activation of Evaluations” menu.

PREVIEWING AN EXISTING EVALUATION

- Click “Manual Creation and Activation of Evaluations” on the side menu.

- Select a course and section using the drop-down menu.

- If an evaluation has been created for the selected course, the page will show you the evaluation’s activation settings, display a preview of the evaluation’s questions, and give you options for editing the evaluation. See the picture below for an example of what you will see, with labels added.
1. **Course description**: Displays the course and section number of the selected course.

2. **Evaluation description**: Displays the type of evaluation that has been created. “Regular Evaluation” is the end-of-term evaluation.

3. **Options for editing evaluation**: These buttons allow you to make changes to the evaluation.
   - Activate Evaluation: This button activates the evaluation manually.
   - Deactivate Evaluation: If the evaluation is active, this button deactivates it. **This button also switches the evaluation to the manual activation method; you will then have to come back and manually activate this evaluation if you want it to be active later in the semester.**
   - Remove Evaluation: This button deletes the evaluation and lets you start from scratch. If this button is missing, that means that at least 1 student has already completed the evaluation so you can no longer edit the evaluation questions.
   - Adjust Activation Schedule: This button lets you change the activation settings of the evaluation.

4. **Activation settings**: This section displays the evaluation’s activation method and schedule, and indicates whether the evaluation is currently active.
   - **If there is a line that reads**: “Evaluation will be activated manually,” this means the evaluation is using a **manual activation** method.
     - **If the next starts with**: “Evaluation is available,” this means the evaluation is **currently active**.
     - **If the next starts with**: “Results will be available,” this means the evaluation is **NOT currently active**.
   - **If there is a line that reads**: “Evaluation will be active from,” this means the evaluation is using a **scheduled activation** method.
     - The date range on the first line indicates when the evaluation will be active. If the current date falls within this date range, then the evaluation is **currently active**.
   - **If the first line reads** “Evaluation will not be created this semester,” this means that students will not be given a teacher evaluation for this course. **Adjust Activation Settings** to change this, if desired.

5. **Start of Evaluation Preview**: The evaluation questions will be displayed below this point.

- Review the evaluation’s activation settings and preview the evaluation questions.
  - **If the evaluation is set up as desired**: you don’t have to do anything. The evaluation is already created and will be activated according to the activation settings.³
  - **If you need to change the evaluation questions**: you will need to click the “Remove Evaluation⁴” button and start over.
  - **If you need to change the activation settings**: Click “Adjust Activation Schedule⁵”.
  - **If you are missing instructor questions that you tried to add**, the only way to fix this is by clicking the “Remove Evaluation⁴” button and creating a new evaluation.

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³ If the evaluation is using the manual evaluation method and is NOT currently active, you will have to manually activate the evaluation when it is time.

⁴ If the “Remove Evaluation” button is missing, that means at least 1 student has already taken the evaluation and it is too late to change the evaluation questions.

⁵ For more instructions, see section called **Adjust Activation Settings**.
REMOVING AN EVALUATION

- If, after previewing an evaluation, you want to make changes to the evaluation questions, follow these steps to remove the evaluation so you can create a new one.

- Click “Manual Creation and Activation of Evaluations” on the side menu.

- Select a course and section using the drop-down menu.

- Click “Remove Evaluation.”

- Click “Make End-of-Term Evaluation” to create a new evaluation. See instructions from Create an Evaluation for more information.

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6 See instructions in previous section called Previewing an Existing Evaluation.

7 If this button is missing, this means that at least 1 student has already taken the course evaluation so it is too late to change the evaluation questions for this term. You can still change the activation settings using the “Adjust Activation Schedule” button if you wish to do so. See next section called Adjust Activation Settings.
ADJUST ACTIVATION SETTINGS

- If, after previewing an evaluation\(^8\), you want to adjust the activation settings, follow these instructions.

- Click “Manual Creation and Activation of Evaluations” on the side menu.

  ![Welcome Page]

  Manual Creation and Activation of Evaluations

  Review Activation Schedules
  Set Automation Rules
  Create Evaluations by Automation Rules

  ![Create Evaluations for Fall Semester 2015]

  Select another course to load current data:
  BIOL 2220 001, Fall Semester 2015

  Click “Adjust Activation Schedule.”

  ![Create Evaluations for Fall Semester 2015]

  Regular Evaluation for BIOL 2221 001 (86101)

  Select your preferred activation method and click “Save and Continue.”

  ![Activation Method]

  - **Scheduled Activation** lets you choose a start date and end date, and the evaluation will automatically be activated during that timeframe.
  - **Manual Activation** means you will need to return to the Instructor Interface page to manually activate the evaluation when it is time.
  - **Do Not Activate** means this course will not have an evaluation for this semester.

\(^8\) See instructions in previous section called Previewing an Existing Evaluation.
• If you chose Scheduled Activation, choose an activation date/time and a deactivation date/time, and click “Save and Continue.” The default range allows the evaluation be active for the last 3 weeks of the term.

![Activation Schedule](image)

• Choose a daily availability for the evaluation, and click “Save and Continue.” The default times are set to avoid scheduled site maintenance.

![Daily Activation Schedule](image)

• The evaluation’s new activation settings will now be displayed.

![Create Evaluations for Fall Semester 2015](image)
AUTOMATION RULES:
SET UP MULTIPLE EVALUATIONS AT ONCE

Automation rules allow you to create and activate many evaluations at once while also customizing the evaluation questions and activation settings. If you use automation rules, you won’t have to create new course evaluations each term.

If you want all of your evaluations to include the same questions and have the same activation settings, you can create and then edit the Default Automation Rule. If you want to use different questions or activation settings for different evaluations, you will need to Create a Set of Automation Rules.

DEFAULT AUTOMATION RULE

- Click on “Set Automation Rules” on the side menu.

- Click “Add Default End-of-Term Automation Rule.”

- You now have a default automation rule called the “Catch-all Rule.”
  - It will automatically make all of your evaluations available to students for the last 3 weeks of each term, and it is set to include University and Department questions in your evaluations.

- Regular Evaluation:
  - Catch-all Rule: Rule 9:
    - Selection criterion is:
    - Applies to: all semesters
    - Shared: Department chair and instructor may view results at end of term
    - University questions will be included
    - Department questions will be included if available
    - Instructor questions will not be included
    - Evaluation will be created and will be active from 11/20/2015 6:00 AM to 12/11/2015 11:30 PM
    - When active, evaluation will be available daily from 6:00 AM to 11:30 PM
• If you want to customize your evaluations with extra questions or different activation settings, click “Edit Automation Rule.”

You may edit/delete: Regular Evaluation:  
**Catch-all Rule: Rule 9 (+) for all semesters**

[Edit Automation Rule] [Delete Automation Rule]

• To edit the evaluation questions:

  Include Questions: [ ]
  - Include Departmental Questions

  Select your questions: [ ]
  - Please select one

  o Uncheck the box if you wish to exclude department questions from your evaluations.
  o Select an instructor question set from the dropdown to include in your evaluations9, if desired.

• To edit the activation settings:

  Change the activation method, if desired.

    Activation Method: [ ]
    Select method for activation of this evaluation.
    - Scheduled Activation
    - Manual Activation
    - Do Not Activate

    - Scheduled Activation is the default. This method lets you choose a start date and end date, and your evaluations will automatically be activated during that timeframe.
    - Manual Activation means you will need to return to the Instructor Interface page to manually activate your evaluations when it is time.
    - Do Not Activate means that none of your courses will have evaluations.

  o Change the activation schedule, if desired.

    Activation Schedule: [ ]
    Set times for activation of evaluation during the semester.
    - Date and time for beginning this evaluation: 11/20/2015 6:00 AM
    - Last Date evaluation available for student: 12/11/2015 11:30 PM
    - Time for releasing evaluation each day: 6:00 AM (Day begins at 12:00)
    - Time for ending availability each day: 11:30 PM

    - Adjust the activation day/time and the deactivation day/time, if desired. The default allows the evaluation to be active for the last 3 weeks of the term.
    - These settings only matter if you are using the scheduled activation method.
    - Adjust the daily availability of the evaluation, if desired. The default times are set to avoid scheduled site maintenance.

• Click “Save Automation Rule” to save the changes you made.

[Save Automation Rule] [Close Form Without Saving]

9 The section called Instructor Question Sets has instructions on how to create your own question sets.
CREATE A SET OF AUTOMATION RULES

Creating a set of automation rules allows you to customize evaluation questions and activation settings differently for different classes. You will need 1 automation rule for each unique combination of evaluation settings you would like to use.

SETS OF AUTOMATION RULES: THE BASICS

- Click on “Set Automation Rules” on the side menu.

- Click “Add Automation Rule for End-of-Term Evaluation.”

- The page will display a list of all of your class sections for the current term.

- Determine how many automation rules you will need.
  - All classes that share an automation rule will have identical evaluations.
  - You will need 1 automation rule for each unique combination of evaluation settings you would like to use.
  - In the example below, if you wanted to use 1 set of evaluation questions for all ECON_-2110 sections, a different set of questions for ECON_-3140, and another set of evaluation questions for ECON_-9820 and ECON_-9910, you would need 3 automation rules.
• Determine a selection criterion to use for each automation rule.
  o Each automation rule needs a selection criterion. The selection criterion dictates which classes
    the automation rule will target.
  o The selection criterion must be compatible with a course’s class section title in order for the
    automation rule to target that class.
  o Use the beginning letters and numbers from the class section titles to create selection criteria
    that will target each set of classes.
  o For each automation rule, create a selection criterion that is compatible with the class section
    titles of all of the desired classes and is incompatible with the class section titles of all other
    classes. Example selection criteria for the 3 automation rules from the last example:

      The following list shows the class section titles for your current courses. These are
      \[\begin{align*}
      \text{ECON} & \_2110\_001 \\
      \text{ECON} & \_2110\_002 \\
      \text{ECON} & \_2110\_003 \\
      \text{ECON} & \_2110\_004 \\
      \text{ECON} & \_2110\_005 \\
      \text{ECON} & \_2110\_006 \\
      \text{ECON} & \_2110\_007 \\
      \text{ECON} & \_2110\_008 \\
      \text{ECON} & \_2110\_009 \\
      \text{ECON} & \_2110\_010 \\
      \text{ECON} & \_2110\_011 \\
      \text{ECON} & \_2110\_012 \\
      \text{ECON} & \_2110\_013 \\
      \text{ECON} & \_2110\_014 \\
      \text{ECON} & \_2110\_015 \\
      \text{ECON} & \_2110\_016 \\
      \text{ECON} & \_2110\_017 \\
      \text{ECON} & \_2110\_018 \\
      \text{ECON} & \_2110\_019 \\
      \text{ECON} & \_3140\_003 \\
      \text{ECON} & \_9820\_002 \\
      \text{ECON} & \_9910\_009 \\
      \text{ECON} & \_9910\_010 \\
    \end{align*}\]

  o Tip: The more digits included in a selection criterion, the smaller the range of classes that the
    criterion will target. Example:
    ▪ If you used “ECON” as a selection criterion, that automation rule would target all of the
      classes in this example.
    ▪ “ECON\_9” targets both of the 9000-level ECON courses.
    ▪ If you used “ECON\_98” as a selection criterion, that would only target ECON\_9820 in
      this example.

10 If it is not possible for you to create selection criteria that are compatible with all desired class titles but
    incompatible with all other class titles, see Sets of Automation Rules: More Techniques for help.
• If you want to include custom questions in your evaluations, get your instructor question sets ready before creating your automation rules\(^\text{11}\).

• Once you have decided the necessary number of automation rules and determined an appropriate selection criterion for each, create each automation rule one-by-one.
  
  o Fill in basic information about the first automation rule.

  ▪ Type in a label and a selection criterion.
  ▪ The "Order for application of rule" is only important if any of your classes are compatible with the selection criterion from more than 1 automation rule. See Sets of Automation Rules: More Techniques for instructions on using automation rule order numbers.
  ▪ Click “Test Criterion on Current Courses,” and scroll down to see which classes will implement this automation rule.

  ▪ If the list of classes is correct, click “Save and Continue.” If the list of classes is incorrect, adjust the selection criterion until the list of classes is correct. If you get stuck, see Sets of Automation Rules: More Techniques for help.

  o Customize the evaluation questions to be included for classes using this automation rule, then click “Save and Continue.”

  ▪ Uncheck the box if you wish to exclude departmental questions from your evaluations.
  ▪ Select an instructor question set from the dropdown to include in your evaluations\(^\text{11}\).

\(^\text{11}\) See section called Instructor Question Sets for instructions on how to create your own question sets.
Choose the desired activation method for classes using this automation rule, then click “Save and Continue.”

- **Scheduled Activation** lets you choose a start date and end date, and the evaluations will automatically be activated during that timeframe.
- **Manual Activation** means you will need to return to the Instructor Interface page to manually activate the evaluations when it is time.
- **Do Not Activate** means that none of the courses using this automation rule will have evaluations.

If you chose Scheduled Activation, choose an activation date/time and a deactivation date/time, and click “Save and Continue.” The default range allows the evaluation be active for the last 3 weeks of the term.

Choose a daily availability for the evaluation, and click “Save and Continue.” The default times are set to avoid scheduled site maintenance.

The automation rule will be displayed on your automation rules page.

Start again to make the next automation rule until all of your automation rules are created.

From the “Set Automation Rules” page, you can review each automation rule and how the rules apply to each of your classes.

- Review the section under the heading “Rules in order of application” for a summary of all of your automation rules.
- Review the section under the heading “Course scheduling according to these rules” for a summary of which rule will be applied to each class.

If you find that you did not set up your automation rules as desired, you can **Review, Edit, and Delete Automation Rules**.
SETS OF AUTOMATION RULES: MORE TECHNIQUES

This section explains additional techniques to fine-tune your automation rules to target the right classes.

- **Wildcard characters**
  - Use the plus sign (+) as a wildcard character in your selection criteria to represent any letter, number, or other character.
  - The plus sign combined with other characters lets you target special groupings of classes.

- **In the above example, you could create an automation rule to target only lab classes with the selection criterion “ECON_++++1”**

- **A selection criterion of just “+” is compatible with every single class section title. This works as a “Catch all” selection criterion.**

- **Automation Rule Ordering**
  - Classes can only implement one automation rule each.
  - Rule ordering allows you to specify which automation rule a class should implement for classes that are compatible with the selection criteria for more than one automation rule.
  - Each class will implement the compatible automation rule with the lowest order number. For example:
    - **Correct rule order to separate these classes using these selection criterion:**
    - **Incorrect rule order to separate these classes using these selection criterion:**

- Always give automation rules with narrow selection criteria low order numbers, and give automation rules with broad selection criteria high order numbers.
- Automation rules with selection criteria that don’t conflict with each other can use the same order number.
Create a “Catch-all” automation rule using just a plus sign (+) as the selection criterion, and give the catch-all rule the highest order number. This way, the catch-all rule will pick up any of your classes that are missed by your other automation rules. Example:

Be careful: if you give the “catch-all” rule a lower order number than your other automation rules, your classes will implement the catch-all rule rather than their targeted rule. Example:
Click on “Set Automation Rules” on the side menu.

From this page, you can review each of your automation rules and view which classes will implement each rule.

- Review the section under the heading “Rules in order of application” for a summary of all of your automation rules.
- Review the section under the heading “Course scheduling according to these rules” for a summary of which rule will be applied to each class.

If you need to edit or delete an automation rule, these options are located under the “Add Automation Rule” buttons. If you have more than one rule, they will be displayed in a dropdown menu.

- Select the desired automation rule, and click the “Edit” or “Delete” button.
CREATE EVALUATIONS FROM AUTOMATION RULES

Any course with a compatible automation rule will automatically have an evaluation created each semester when the first student from that course accesses the evaluation website. Although it is not necessary, you can manually create course evaluations using automation rules from the “Create Evaluations by Automation Rules” tab.

- Click “Create Evaluations by Automation Rules” on the side menu.

- The page will display a list of all the course evaluations that will be created, and indicate which rule will be applied to each course.

- To create the course evaluations as described on this page, click the “Create These Evaluations” button.

  **According to your rules:**
  Your evaluations will be created as indicated.
  
  **Create These Evaluations**

- Note: This method will ONLY create evaluations for courses that have an applicable automation rule.
MID-TERM EVALUATIONS

Mid-term evaluations allow you to collect student feedback for improvement of a course during the semester. Unlike end-of-term evaluations, you can access the results of mid-term evaluations right away. Implementing the suggestions from mid-term evaluations may help you increase the student participation on end-of-term evaluations.

- In order to make a Mid-term evaluation, you must have already created and published an instructor question set in your question bank. See Instructor Question Sets for instructions.
- You can create mid-term evaluations in the same ways you create end-of-term evaluations using the Manual Method: or using Automation Rules: just click the Mid-term button rather than the End-of-term button.
- Differences between End-of-term evaluations and Mid-term evaluations:
  o You can have as many Mid-term evaluations for each course as you would like.
  o Mid-term evaluations ONLY include instructor questions, not University or department questions.
  o While setting up Mid-term evaluations, you get to choose:
    ▪ Whether to allow your department chair to view the evaluation’s results.
    ▪ Whether to have access to the results right away or at the end of the term.
CHECK READINESS OF ALL EVALUATIONS

Prior to course evaluation time each semester, you may want to confirm that all of your evaluations are ready to go or check whether any require additional action. This process differs slightly depending on if you use automation rules or not. If you have any automation rules set up (this includes if you used the “Activate All Evaluations Now”/“Easy Button”), then use the instructions from Checking Readiness of Evaluations – Automation Rules Present. If you have no automation rules set up, use instructions from Checking Readiness of Evaluations – No Automation Rules.

CHECKING READINESS OF EVALUATIONS – NO AUTOMATION RULES

Only use this section if you have no automation rules. This section gives instructions to check which of your course evaluations require any further action from you to make them ready for students. This section also gives instructions on how to activate or deactivate evaluations, and how to preview the questions in your evaluations.

- To view the status of all of your created course evaluations for the current term:
  - Click “Review Activation Schedules”
  - Near the top of the page, there should be a bolded line that reads, “No Automation Rules Exist.” If instead of “No Automation Rules Exist,” you see a line that reads “According to your rules,” you have at least 1 automation rule and should follow the instructions from Checking Readiness of Evaluations – Automation Rules Present instead of using this section.
  - The “Evaluations Created” section lists all classes whose evaluations have been created for the current term.
Check whether the evaluations are active:

- If the evaluation is active, the description next to the course title will read “regular evaluation is available now.”
- If the evaluation is NOT active, the description will read “regular evaluation is not available now” or “regular evaluation will not be activated this semester.”

Check the activation method of inactive evaluations:

- If the evaluation description reads “Scheduled to be available” followed by a date range, the evaluation is using the scheduled activation method. The evaluation will automatically be activated during the specified date range.
- If the evaluation description reads “Ask your instructor when to expect it to be available,” the evaluation is using the manual activation method. You must manually activate this evaluation in order to make it available to students.
- If the evaluation description reads “regular evaluation will not be activated this semester,” the evaluation is set to remain inactive. You must change the activation method using instructions from Adjust Activation Settings if you wish students to evaluate this course.

Manually activate or deactivate evaluations: Find the desired class from the dropdown menu, and select “Activate Evaluation” or “Deactivate Evaluation.”

---

12 Students cannot take the evaluation until it is activated.
NOTE: The “Review Activation Schedules” tab will list all of your courses that have evaluations created, but it will NOT list any of your courses that do not have an evaluation created.

- If you are unsure and wish to confirm that an evaluation has been created for each of your courses:
  - The “Manual Creation and Activation of Evaluations” tab has a dropdown menu of all of your courses for the current term. You can select each course one at a time to confirm that an evaluation has been created for each of your courses.
    - Click “Manual Creation and Activation of Evaluations” on the side menu.
    - Select each course one at a time using the drop-down menu.
    - If there is a “Make End-of-Term Evaluation” button, then that course does NOT have an evaluation created for this term. Create an Evaluation if you wish to have students evaluate this course.
    - If there is no “Make End-of-Term Evaluation” button, then that course DOES have an evaluation created for this term.
To preview evaluation questions:

- From the “Review Activation Schedules” tab, you can preview all activated evaluations.
  - Click “Review Activation Schedules”
  - Click the radio button next to the desired course, and click “Review Evaluation” to view the evaluation as students will see it.

- You can preview evaluation questions for all created evaluations\(^\text{13}\) from the “Manual Create and Activation of Evaluations” menu.
  - Click “Manual Creation and Activation of Evaluations” on the side menu.
  - Select a course and section using the drop-down menu, and a preview of the evaluation’s questions will be displayed at the bottom of the page.

\(^{13}\) With the exception of evaluations assigned the “Do Not Activate” activation method.
**CHECKING READINESS OF EVALUATIONS – AUTOMATION RULES PRESENT**

Only use this section if you have at least one automation rule. This section gives instructions on how to check which of your course evaluations have been created, which are currently active, which will be created using automation rules, and which still need to be set up. This section also gives instructions on how to activate and deactivate evaluations and how to preview the questions in your evaluations.

- **Click “Review Activation Schedules”**

- The “According to your rules” section lists all classes whose evaluations have NOT yet been created.
  - Classes in this section that list an automation rule under “Regular Evaluation” will have their end-of-term evaluations automatically created by that automation rule.
    - The bullet points will display (1) the name of the applicable automation rule, (2) the questions that will be included in the evaluation, and (3) the activation settings.
    - Check the activation settings:
      - If the description reads “Evaluation will be created and will be active from” followed by a date range, the evaluation will be automatically activated during the specified date range.
      - If the description reads “Evaluation will be created, but must be activated manually,” you will need to manually activate the evaluation once it is created in order to make it available to students.
      - If the description reads “Evaluation will not be activated during term,” the evaluation is set to remain inactive. You must change the activation method by Review, Edit, and Delete Automation Rules if you wish students to take the evaluation.
  - Classes without evaluations or automation rules will also be displayed in this section.
    - If a course appears in this section with the description “No rules apply to this course,” then you must create an evaluation or automation rule for this course if you wish to have students evaluate the course.

14 If instead of an “According to your rules” section you see a “No Automation Rules Exist” section, that means you don’t have any automation rules and you should follow the instructions from Checking Readiness of Evaluations – No Automation Rules instead of using this section.

15 Students cannot take the evaluation until it is activated.
The “Evaluations Created,” section lists all classes whose evaluations have been created for the current term.

Check whether the evaluations are active:
- If the evaluation is active, the description will read “regular evaluation is available now.”
- If the evaluation is NOT active, the description will read “regular evaluation is not available now” or “regular evaluation will not be activated this semester.”

Check the activation method of inactive evaluations:
- If the evaluation description reads “Scheduled to be available” followed by a date range, the evaluation is using the scheduled activation method. The evaluation will automatically be activated during the specified date range.
- If the evaluation description reads “Ask your instructor when to expect it to be available,” the evaluation is using the manual activation method. You must manually activate this evaluation to make it available to students.
- If the evaluation description reads “regular evaluation will not be activated this semester,” the evaluation is set to remain inactive. Change the activation method by Adjust Activation Settings if you wish students to take this evaluation.

Manually activate or deactivate evaluations: Find the desired class from the dropdown menu, and select “Activate Evaluation” or “Deactivate Evaluation.”

16 Students cannot take the evaluation until it is activated.
• Preview evaluation questions:
  o From the “Evaluations Created” section, you can only preview evaluations that have been
    activated. Click the radio button next to the desired course, and click “Review Evaluation” to view
    the evaluation as students will see it.

  o You can preview evaluation questions for all created evaluations from the “Manual Create and
    Activation of Evaluations” menu.
    ▪ Click “Manual Creation and Activation of Evaluations” on the side menu.
    ▪ Select a course and section using the drop-down menu, and a preview of the
      evaluation’s questions will be displayed at the bottom of the page.

  o It is not possible to preview the evaluation questions for courses whose evaluations have not yet
    been created.
    ▪ This includes courses whose evaluations will be automatically created by automation
      rules. If you wish to preview these evaluations, you can manually create course
      evaluations using automation rules by following the instructions from Create
      Evaluations From Automation Rules.

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17 With the exception of evaluations assigned the “Do Not Activate” activation method.
INSTRUCTOR QUESTION SETS

Along with the default University questions and Department questions, you may add your own questions to your course evaluations to get more targeted feedback on your courses. You may only add 1 instructor question set per course evaluation, but you may create and save as many question sets as you like in your question bank.

QUESTION SET OVERVIEW

ADDITION QUESTION SETS

- You can add question sets to your question bank by creating them yourself (Create a New Question Set) or by looking through other faculty members’ question sets and picking sets to add to your question bank. (Add Question Sets from Other Faculty members)

ADDING OR REMOVING QUESTIONS FROM QUESTION SETS

- You can only add or remove questions from draft question sets.
- You can edit most published question sets by clicking the icon to move the question set to the “Draft Question Sets” section.
- You cannot edit question sets that are currently assigned to course evaluations. To make an editable version, you can copy the question set using the icon. The copy will appear in your “Draft Question Sets” section. This will not affect the question set currently assigned to course evaluations.
- You cannot edit the questions in a shared question set (AKA, a question set that you borrowed from another faculty member). To make an editable version, you can copy a shared question set using the icon. The copy will appear in your “Draft Question Sets” section. This will not affect the original question set.
- Once the question set is in your “Draft Question Sets” section, follow instructions from Add Questions to Draft Question Sets or Remove Questions from Draft Question Sets.

USING OTHER FACULTY MEMBERS’ QUESTIONS

- You can use other faculty members’ questions in your course evaluations in 3 different ways.
  - You can add another faculty member’s question set to your question bank and use it exactly as is. (Add Question Sets from Other Faculty members)
  - After you add another faculty member’s question set to your question bank, you can make a copy of the shared question set using the icon and then add or remove questions from the copy to suit your needs. After making the copy, follow instructions from Add Questions to Draft Question Sets/Remove Questions from Draft Question Sets.
  - After you add another faculty member’s question set to your question bank, you can copy questions from the shared question set to add to one of your own draft question sets. After adding the shared question set, follow instructions from Add Questions to Draft Question Sets.

USING QUESTION SETS IN YOUR COURSE EVALUATIONS

- You can only add published question sets to course evaluations. To publish a draft question set, click the icon to move the set into the “Published Question Sets” section. This will move the question set from the top section to the middle section, where it lists published sets.
- Follow instructions from Manual Method: or Automation Rules: to create an evaluation that includes one of your instructor question sets.
CREATE A NEW QUESTION SET

- Click on “Edit Question Bank” from the side menu.

- Click “Add New Question Set”

- Edit the question set attributes:
  - Add a label and description.
  - Choose which course to associate with the question set; the course will be the title for the question set.
  - If desired, edit the sorting order for the set. This will determine the order that the question sets appear in your “Draft Question Sets” section.
  - Click “Save Changes.”

- The question set will appear in your “Draft Question Sets” section.
ADD QUESTION SETS FROM OTHER FACULTY MEMBERS

- Click on “Edit Question Bank” from the side menu.

- Click “Add Existing Questions Sets”

- Choose a department and faculty member from the dropdown menus, then click “Show Member Question Bank.”

- Browse through the faculty member’s question sets. Click the name of the question set to view the questions. The arrows to the right of the question set title show which set is currently selected.
- The questions from the question set you select will appear on the right side of the page.

- Once you have found the question sets you would like to use, check the boxes next the desired question sets and click “Add Question Sets to My Question Bank.”

- The shared question sets will appear in your published question sets with the label “Shared Question Set.” If desired, you can re-label the question set by clicking the icon to the left of the question set.
ADD QUESTIONS TO DRAFT QUESTION SETS

- Click “Edit Question Bank” from the side menu.

- Avoid including duplicate questions in your Instructor question sets by first reading through the University and Department question sets. Click on the question sets in the “Default Question Sets” section to review.

- Adding or Removing Questions from Question Sets In the “Draft Question Sets” section, click the name of the question set to add questions. The arrows to the right of the question set show which set is currently selected.

- You can create your own questions or add existing questions from one of your other question sets.
  - To create a new question:
    - Click “Add new question.”
    - Choose the type of response you would like the question to have. Click on the yellow question mark to view a description of response types.
    - Write the question in the “Edit question text” box.
    - If desired, edit the question sorting order. This will determine the order of the questions within the question set.
- Click “Save Changes.”
  - To copy a question from one of your other question sets:
    - Click “Add question from My Question Bank”
      ![Add question from My Question Bank](image)
    - Click the name of the question set from which you would like to copy a question. The arrows to the right of the question set show which set is currently selected.
      ![Question Bank - Add Existing Questions](image)
    - Check the boxes next to the questions you would like to copy.
      ![Select questions](image)
    - The questions you selected will be added to your question set.
      ![Questions for set labeled, ECON 6220 Questions](image)

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18 You can also use the “Search for Other Question Sets” button to look through other faculties’ question sets and add them to your own collection of question sets.
• If desired, change the order of the questions:
  o Click the “Sort questions” button.
  o Put the corrected order number next to each question, and then click “Sort Questions.”
• Click on “Edit Question Bank” from the side menu.

• In the “Draft Question Sets” section, click the name of the question set you would like to remove questions from. The arrows to the right of the question set show which set is currently selected.

• The questions will appear on the right. Click the icon next to the question you wish to remove.
EVALUATION RESULTS

This section provides instructions on how to monitor response rates for your evaluations, how to view and download evaluation results, and how to control access to your evaluation results.

CONTROLLING ACCESS TO EVALUATION RESULTS

Your department chair is always granted access to the statistical summaries from University and department scale-based questions, but you can decide whether or not to allow your department chair access to the rest of the content from your evaluations.

- Click “Control Access to Summary Reports” from the side menu.

Choose “Allow Access” or “Restrict Access” for each of the 3 question categories:
- Student comments for University and department questions
- Summary statistics for instructor questions
- Student comments for instructor questions

- Click “Save Department Access Settings.”
MONITOR RESPONSE RATES FOR EVALUATIONS

While evaluations are active, you can monitor the number of responses for each evaluation to ensure that students are participating in adequate numbers.

- Click “View Responses and Summary Reports”

<table>
<thead>
<tr>
<th>Results</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Control Access</td>
<td></td>
</tr>
<tr>
<td>to Summary</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td></td>
</tr>
<tr>
<td>View Responses</td>
<td></td>
</tr>
<tr>
<td>and Summary</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td></td>
</tr>
<tr>
<td>Discipline</td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td></td>
</tr>
<tr>
<td>Download Response Data</td>
<td></td>
</tr>
</tbody>
</table>

- View the first section, called “Responses for Evaluations in Current Term.”

<table>
<thead>
<tr>
<th>Responses for Evaluations in Current Term*</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Class</td>
<td>Eval Num</td>
</tr>
<tr>
<td>MICR 3051 002</td>
<td>Regular (85852)</td>
</tr>
<tr>
<td>MICR 3051 007</td>
<td>Regular (85855)</td>
</tr>
<tr>
<td>MICR 3051 011</td>
<td>Regular (85868)</td>
</tr>
</tbody>
</table>

- This section will only display courses whose evaluations have been created for the current term. If a course is missing from this list, check to make sure the evaluation has been created. [Check Readiness of All Evaluations.](#)
- Students cannot take an evaluation until it has been activated. If a course is not getting any responses, check to make sure the evaluation is activated. [Check Readiness of All Evaluations.](#)
- Continue reminding your students to go to complete the evaluations. Many students don’t bother if they aren’t encouraged by the faculty member.
EVALUATION SUMMARY REPORTS

Evaluation summary reports provide basic summary statistics (mean, standard deviation, etc.) from each scale-based question, provide a comparison of those statistics with other courses in your discipline, and allow you to view the responses to open-ended questions. Results of your end-of-term course evaluations for the current semester will be available after the last day to submit grades. You may view results of course evaluations from past semesters at any time.

- Click “View Responses and Summary Reports.”

- Indicate your desired options in the “Summary Reports” section.

- Pick a semester from the dropdown menu.
- The course evaluations available from that semester will be displayed in a table.
- Pick a class from the dropdown menu.
- In the “Display Preferences” section, check the boxes to indicate which questions you would like to be included in the report.
  - “Global Questions” are the default University questions.
  - “Instructor Annotation” are comments you may add to the evaluation from the
    “Management Options” section, which is below the “Summary Reports” section.
- In the “Comparison statistics” section, indicate whether you would like your evaluation’s statistics compared to all other evaluations in your discipline, only evaluations in your discipline taught by graduate students, or only evaluations in your discipline NOT taught by graduate students.
Pick a report option.

- **View Summary and Comments**: This option produces a report that displays the summary statistics and comparison statistics for each item. It also displays the written responses to the open-ended questions. Example:

  G1. The instructor clearly communicated what I was expected to learn.
  
  **Type**: How much

<table>
<thead>
<tr>
<th></th>
<th>Not at all (1)</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>Very much (5)</th>
<th>NR</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 (0.00%)</td>
<td>0 (0.00%)</td>
<td>18 (81.82%)</td>
<td>1 (4.55%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus</td>
<td>4.81</td>
<td>0.512</td>
<td>5</td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean</td>
<td>4.13</td>
<td>0.994</td>
<td>4</td>
<td>1314</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stdev</td>
<td>3.956</td>
<td>1.054</td>
<td>4</td>
<td>91</td>
<td></td>
<td></td>
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<tr>
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<td></td>
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<tr>
<td>Class</td>
<td>4.81</td>
<td>0.512</td>
<td>5</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Same Level</td>
<td>3.956</td>
<td>1.054</td>
<td>4</td>
<td>91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Same Discipline</td>
<td>4.13</td>
<td>0.994</td>
<td>4</td>
<td>1314</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Download Summary**: Same as the “View Summary and Comments” button, but in the form of a Word document. This option allows for easier printing.

- **View Compact Summary**: This report condenses the information into a table with 1 line per evaluation question. Written responses to open-ended questions are not included. Example:

- **Download Compact Summary**: Same as the “View Compact Summary” button, but in the form of a Word Document. This option allows for easier printing.

- **View Student Comments Only**: Just the responses to open-ended questions. Example:

  G18. Please comment on the strengths of the instructor and the course.
  
  **Type**: Essay

<table>
<thead>
<tr>
<th>Student</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>very helpful</td>
</tr>
<tr>
<td>#4</td>
<td>I liked the format of the tests and the project.</td>
</tr>
<tr>
<td>#6</td>
<td>He knew the course content well</td>
</tr>
<tr>
<td>#7</td>
<td>Great professor loved the format of the class and exams.</td>
</tr>
<tr>
<td>#8</td>
<td>Very straightforward and passionate about topic</td>
</tr>
<tr>
<td>#9</td>
<td>Strengths were clearly letting the class know what was expected on assignments and information we needed to know for test.</td>
</tr>
<tr>
<td>#10</td>
<td>Very good at lecturing and making great examples</td>
</tr>
<tr>
<td>#11</td>
<td>He obviously knew the material and was interested in it, and provided all the information necessary to do well in the course.</td>
</tr>
<tr>
<td>#12</td>
<td>He really knows his stuff and is willing to help you out in any way that he can</td>
</tr>
</tbody>
</table>

- **Download Student Comments**: Same as “View Student Comments Only,” but in a Word document. This allows for easier printing.

- **List Questions**: Just a list of each question and the response scales used. Example:

  G1. The instructor clearly communicated what I was expected to learn.
  
  **Type**: How much; Scale: 1 (Not at all) - 5 (Very much)

  G2. The instructor made the relevance of the course material clear.
  
  **Type**: How much; Scale: 1 (Not at all) - 5 (Very much)

  G3. The course was well organized.
  
  **Type**: How much; Scale: 1 (Not at all) - 5 (Very much)

- **Download Questions**: Same as “List Questions,” but in a Word document. This allows for easier printing.
The management options on the “View Responses and Summary Reports” tab allow you to withhold department chair access to individual evaluations and to annotate individual evaluations.

- Click “View Responses and Summary Reports.”

- In the “Summary Reports” section, pick a semester and a course.

- In the “Management Options” section:
  
  o Click the “Make Evaluation Private” button if you wish to have this evaluation disappear from the list of evaluations available to your department chair.

  o Add any desired comments in the text box and click the “Annotate Evaluation” button to have these comments appear on summary reports of this evaluation. These comments will be available to your department chair.
The “Download Response Data” tab allows you to download results in the form of raw data, meaning individual students’ responses to each evaluation question. This can be useful if you would like to conduct additional analyses beyond the basic summary statistics provided in the summary reports.

- Click “Download Responses Data.”

- Pick a semester and a course, and pick a report option.
  
  - **Excel CSV**: Creates an Excel file including full text of questions and comments.
  - **Windows CSV**: Creates an Excel file with question numbers instead of question text, and limits student comments to 200 characters.
  - **MacIntosh File**: For Mac users.