

Series G: Surveys

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Overview

Post-Course Surveys allow your training administrators the ability to collect feedback on your course offerings--both classroom and online--and help identify the overall effectiveness of a training course and areas for improvement. Use a post-course survey to help gain insight into how employees are feeling about the overall training itself and the people who facilitate it.

Before You Use This Guide

Users must have an Administrator account created for them in the Learn system. Please contact NEOGOV if an account has not yet been set up for you.

Who Should Use This Guide

This guide is intended to be used by LE Administrators to gain familiarity with the survey functionality.

Contacts for Questions

The following additional resources are available should you have questions about Learn:

1. [NEOGOV Community](#): Requires NEOGOV product login ID and password for access
2. NEOGOV Customer Support: customersupport@neogov.com
3. NEOGOV Customer Support: (877) 204-4442

Creating a Survey

Who Should Use This Section

This section is intended for Learn Administrators to create and manage post-course surveys in Learn.

Survey Library

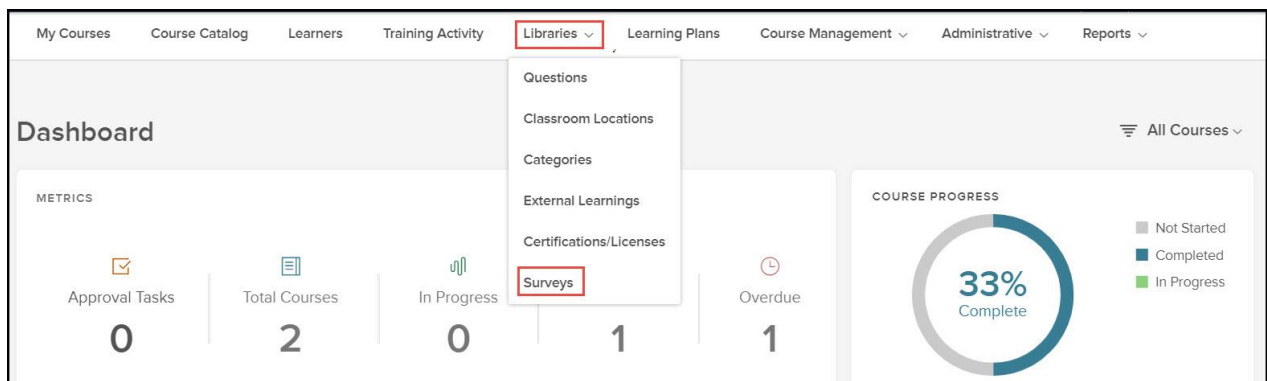


Figure 1: Libraries > Surveys

Creating a course via the survey library is simple! Click the **Libraries** dropdown, then click **Surveys**.

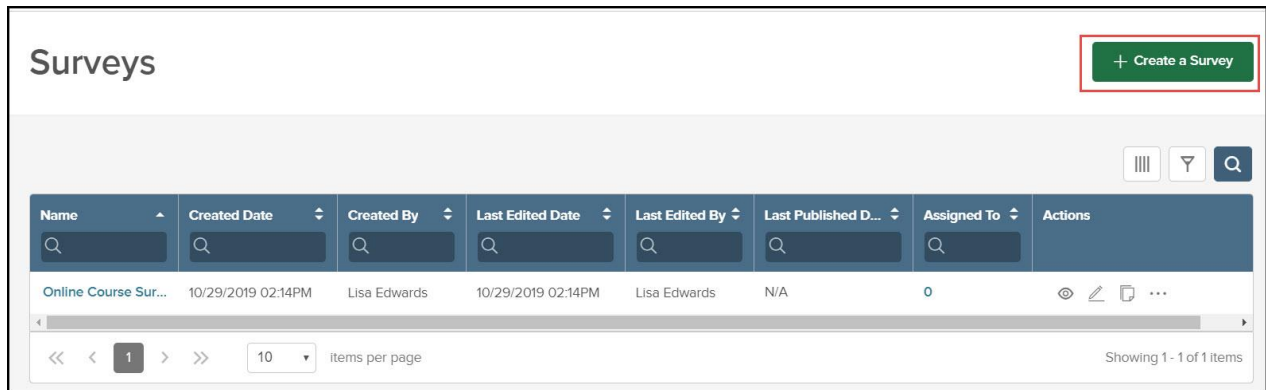


Figure 2: + Create a Survey

From the Surveys page, click +Create a Survey.

Survey Editor Details Page

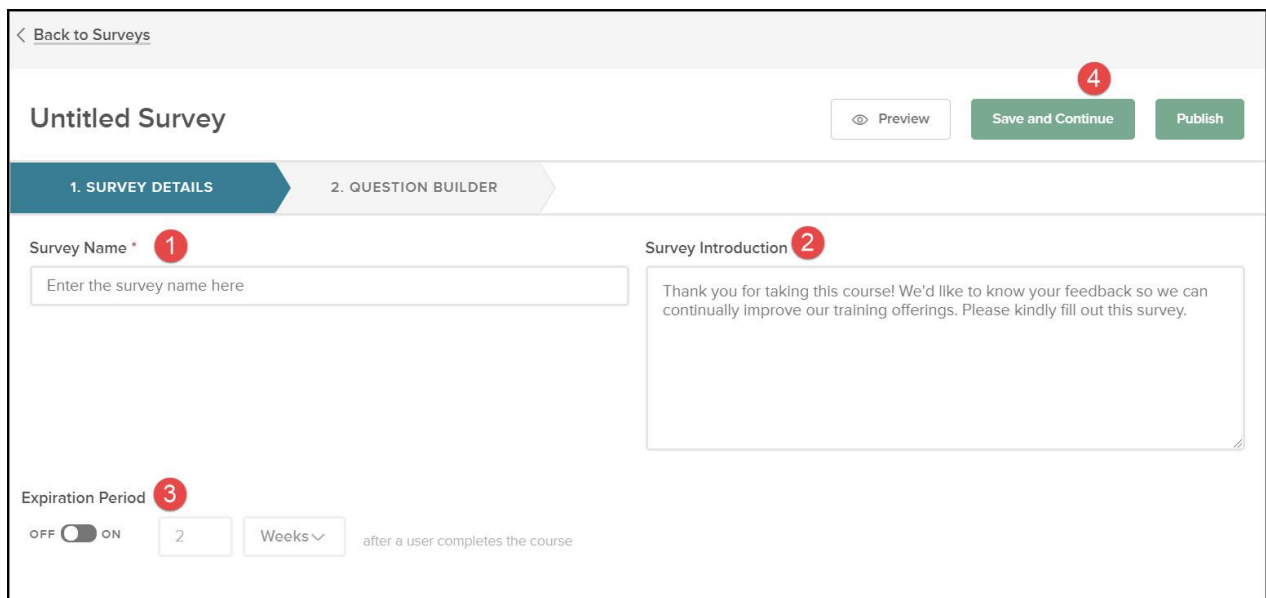


Figure 3: Survey Details Page

To create a survey, first complete the Survey Editor Details page.

1. **Survey Name:** Enter the survey name to help identify your survey
2. **Survey Introduction:** Enter any special instructions or information your employees should read before beginning the survey.
3. **Expiration Period:** Enter the amount of time the Learner has to complete the survey after completing the course. Toggle the switch to ON if using this feature.
4. **Save and Continue:** Click Save and Continue to proceed to the Question Builder.

Question Builder

Figure 4: Question Builder

The Question Builder enables the HR Admin to create a survey using a combination of question types. Having a variety of question types helps ensure that the most valuable and critical feedback on your course offerings is collected from respondents.

Question Types:

- **Single Select:** Limit selection of responses to one selection only, for a specific question/comment.
- **Multiple Choice:** Allow multiple responses for a specific question/comment.
- **Linear Scale:** Used in measuring an option to a question or topic. Linear Scales are best used for non-numeric or text based ratings. Linear Scale questions include suggested scales you can use.
- **Star Rating** – Used for numeric responses and averages.
- **Comment Box** – Used for capturing a more detailed explanation to a question/comment.

1. **Question Text:** Enter the text for your first question.
2. **Question Type:** Select the question type.
3. **Add an Answer Choice:** Add additional answer choices if more than 2 are needed. Click the trash can icon if you wish to remove any choices.
4. **Required:** Click to slide toggle to green if question is required.
5. **Copy Question:** Click to create a duplicate question.

6. **Delete:** Click trashcan icon to delete the question if needed.
7. **SAVE:** Click to SAVE question.
8. **Add a Question:** Additional questions can be added by clicking +Add a Question OR by selecting a question type from the left menu.
9. **Preview:** Use the Preview feature to review your survey and make any changes during the creation process before assigning it to a course.
10. **Publish:** Click Publish when survey creation has been completed.

Assign a Post-Course Survey

Who Should Use This Section

Admins who need to assign a post-course survey to a course or courses. A post-course survey can be assigned from the Survey Library, the Survey Details page, or the Course Details page. Post-course surveys can be assigned to Classroom courses, Pre-built Online courses, and Custom Online courses only.

From the Survey Library

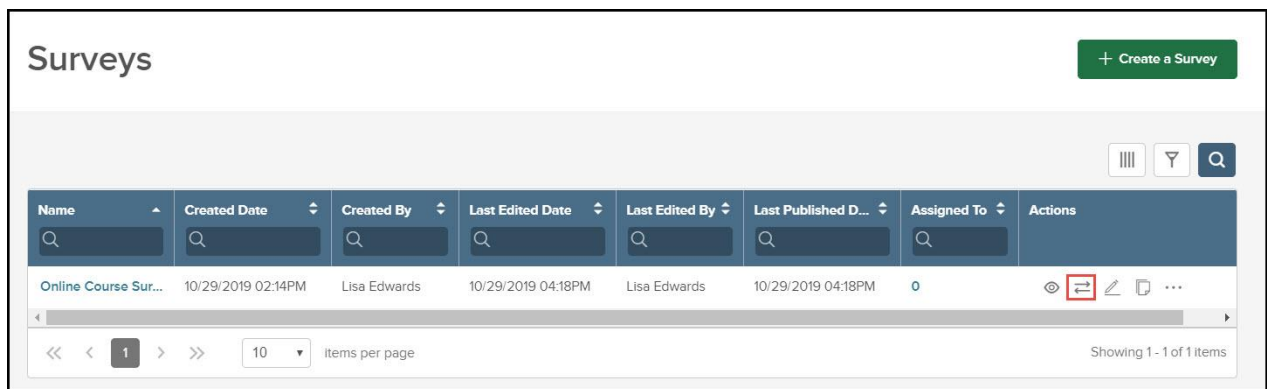


Figure 5: Survey Library > Assign

From the Survey Library, click the arrows icon to assign the survey.

From the Survey Details page

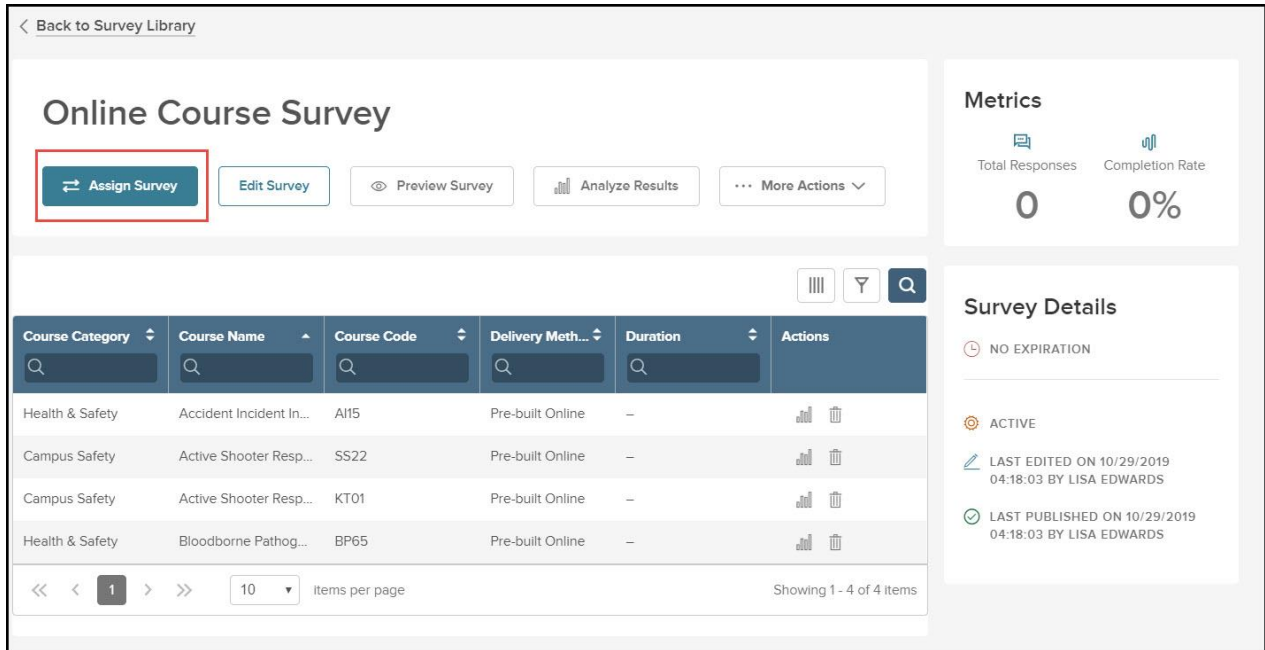


Figure 6: Survey Details > Assign Survey

From the Survey Details page, click the Assign Survey link.

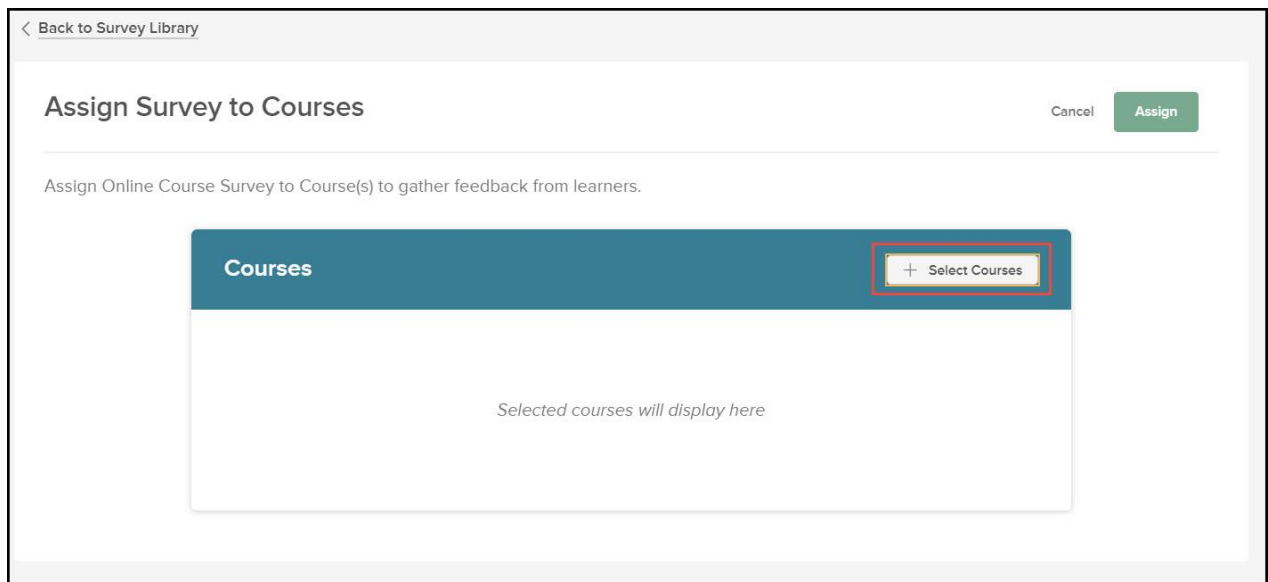


Figure 7: Select Courses

When the Assign Survey link is clicked from either the Survey Library page or the Survey Details page, you will be directed to the Assign Survey to Courses page. This feature will save time by simplifying the process for surveys that apply to more than one course.

Click +Select Courses to select the courses you wish to assign the survey to. Your list of courses will appear. Check the box next to each course you wish to assign the survey to, then click Select Courses.

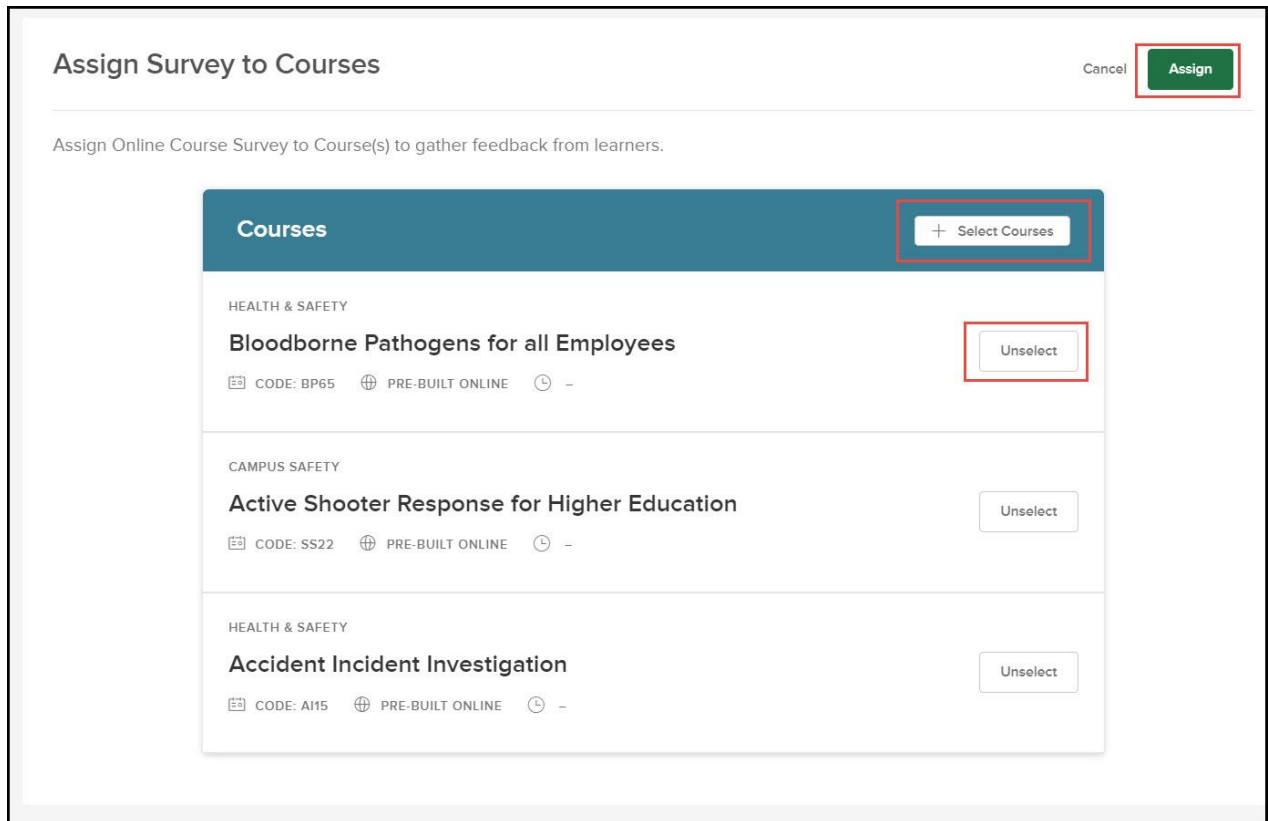


Figure 8: Select & Unselect Courses

You may continue selecting courses by clicking +Select Courses. Click Unselect to remove any selected courses. Click Assign when finished.

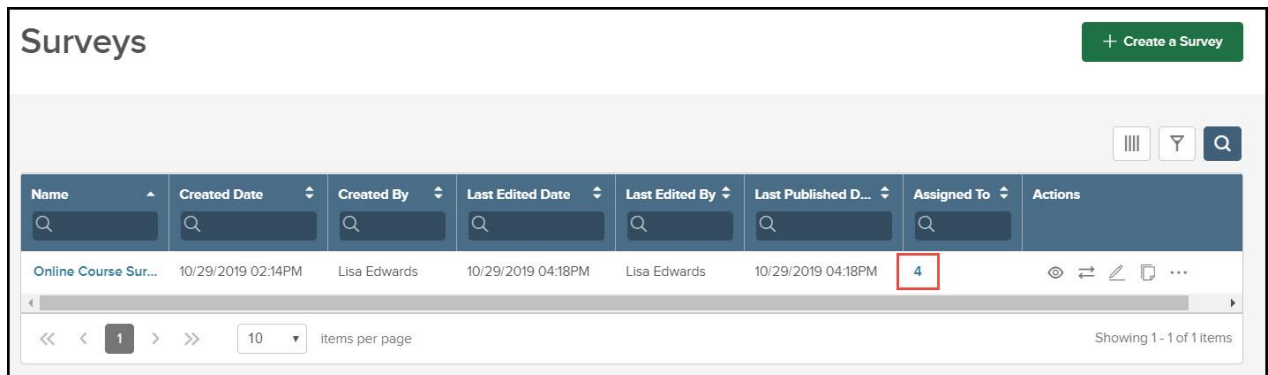


Figure 9: Number of Courses Assigned

The Survey Library page will now display the number of courses the survey has been assigned to. Click the number to view the courses.



Assign via the Survey Library or the Survey Details Page when assigning a survey to multiple courses at once!

Course Details Page

The screenshot shows the 'SURVEY SETTINGS' section with various configuration options. A 'Click to collapse area' button is visible above the settings. The settings are as follows:

- Recurring Enrollment:** OFF (toggle), ON (toggle), Every 1 Months (dropdown)
- Gated:** OFF (toggle), ON (toggle)
- Self-Enrollment:** OFF (toggle), ON (toggle)
- Pass Required:** OFF (toggle), ON (toggle)
- Passing Score:** Enter value % (input field)
- Enrollment Approval Required:** OFF (toggle), ON (toggle)
- Enrollment Approval:** Select one (dropdown)
- SURVEY SETTINGS:** (Section header with collapse arrow)
- Survey:** Select one (dropdown) [1]
- Preview Survey:** (button) [2]
- Hide respondents' identities:** OFF (toggle), ON (toggle) [3]
- Expiration Period:** OFF (toggle), ON (toggle) [4], 2 Weeks (input and dropdown), after a user completes the course

Figure 10: Survey Settings

Surveys can also be assigned via the Course Details page while creating or editing a course.

- From Course Management on the top menu in Learn, select Admin Catalog.
- Click on a course title or click + Add a Course. Make sure the Publish toggle is off, then click Edit Course. (If creating a new course, the Publish toggle will be off and you will automatically be in edit mode.)
- Scroll to the Survey Settings section.

1. **Survey:** Select a survey from the Survey Library page.
2. **Preview Survey:** Preview the selected survey if needed.
3. **Hide Respondent's Identities:** Hide the identities of your respondents.
4. **Expiration Period:** Configure an Expiration Period to collect responses at the course level.

Completing a Post-Course Survey

Who Should Use This Section

All Learners who need to complete a post-course survey.

Course Completion Notification

Upon course completion, a direct link to access the survey is appended to the Class Completion and Online Course Completion notifications. If the survey has an Expiration Period set, the notification will display the date for which the survey is expected to expire, and the learner will no longer be able to submit their responses once that date is in the past.

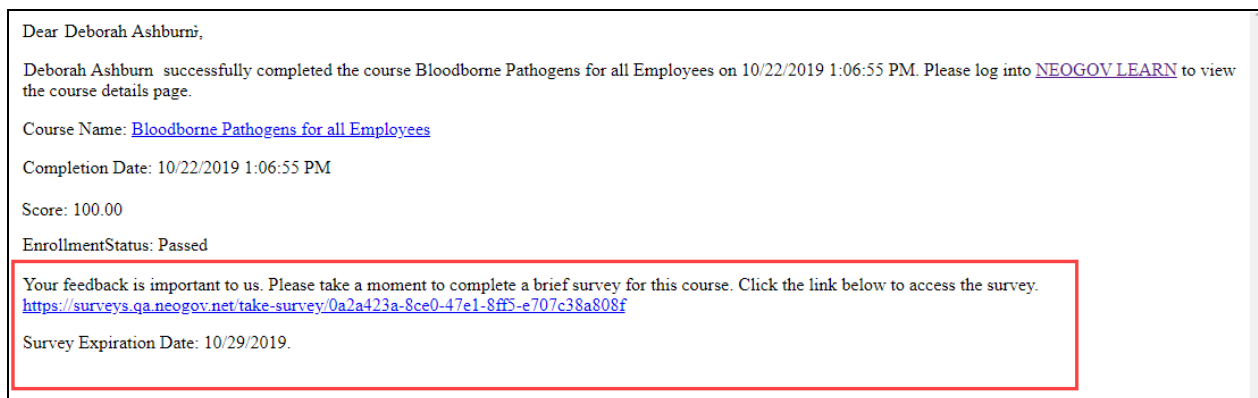


Figure 11: Course Completion Notification

Please note: If “Hide Respondents’ Identities” setting is enabled, the learner will not be required to log in to the system to complete the survey. This ensures that the learner’s identity is not known to administrators when providing their feedback.

My Courses

In addition to the Course Completion Notification, the Take Survey link is accessible from the Course Card via the My Courses link on the top menu in Learn. Click the **My Courses** tab from the menu bar, then scroll to the recently completed course. From there, select **Take Survey**.

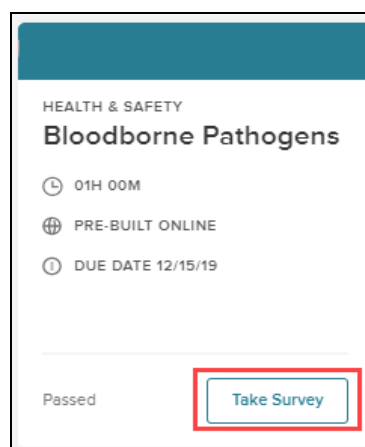


Figure 12: Course Card > Take Survey

Learners can also select the **Course Name** to view the **Course Details Page**. On the **Course Details Page**, select **Take Survey**.

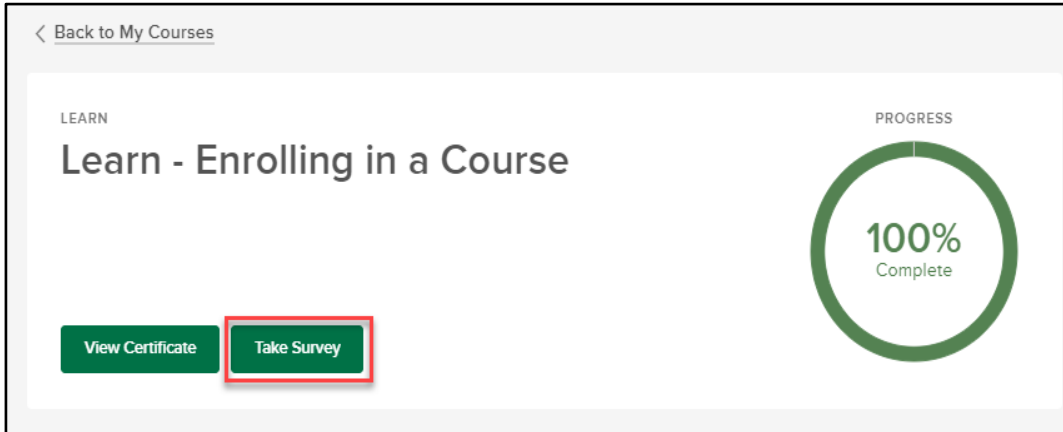


Figure 13: Course Details > Take Survey

Learner Profile

Learners can also complete surveys via their **Learner Profile**. To navigate to the Survey, select your name located in the top right corner, then select **My Profile**.

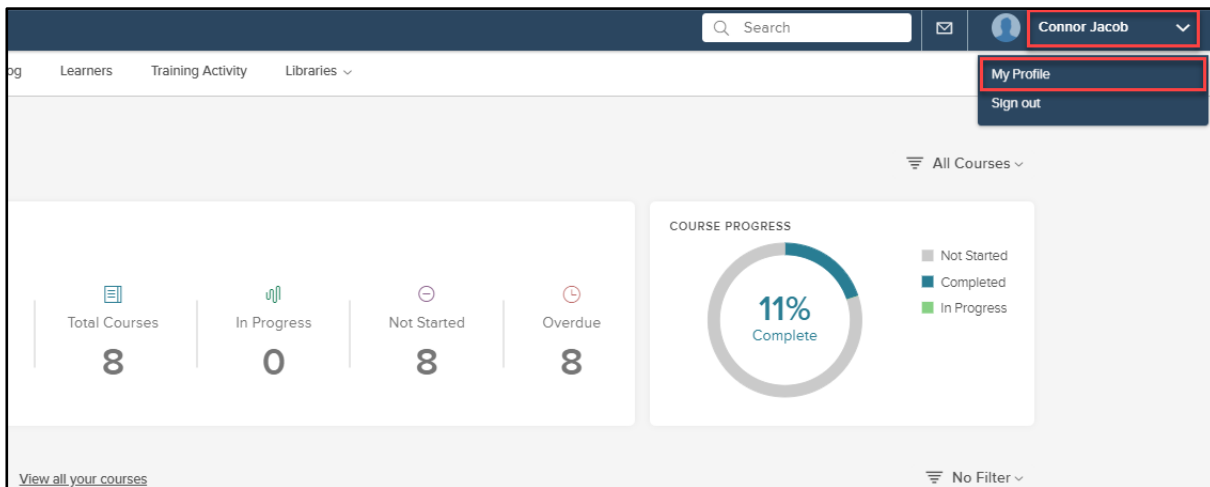


Figure 14: Learner Profile

Once on the Learner Profile, scroll to **Completed Courses**, then select **Take Survey**.

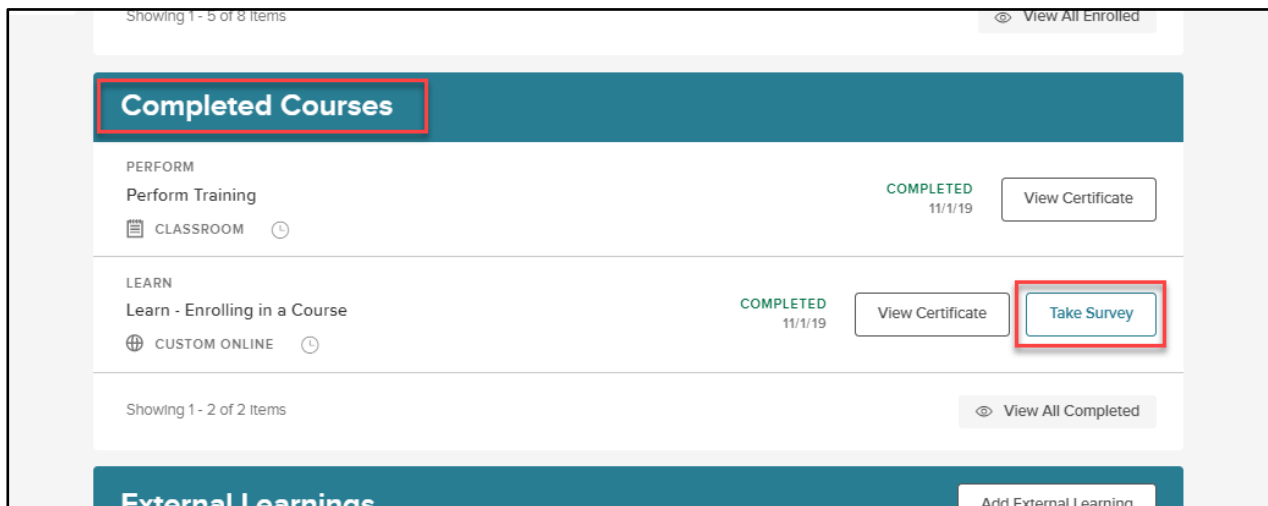


Figure 15: Completed Courses > Take Survey

Post-Course Survey Reports

Overview

Survey Reports give administrators the ability to view an aggregate of all responses as well as individual response feedback. The **Survey Report** can help administrators identify trends in your course offerings to further develop useful and engaging training. Administrators can use reports to identify popular courses that could increase enrollment or attendance, identify trainers and a better insight to their training styles, identify any barriers to learning such as content, facility/location, pace or duration, or further improvements to delivering training.

Who Should Use This Section

This section is intended for HR Admins in order to report on survey responses within Learn. Survey Reports can be accessed via the **Survey Library** and via the **Reports Dropdown** and are broken down into two types of reports-**Question Summary & Individual Responses**.

Survey Library

To access **Survey Reports** via the **Survey Library**, select **Libraries**, then **Surveys** to view a list of all surveys within your environment.

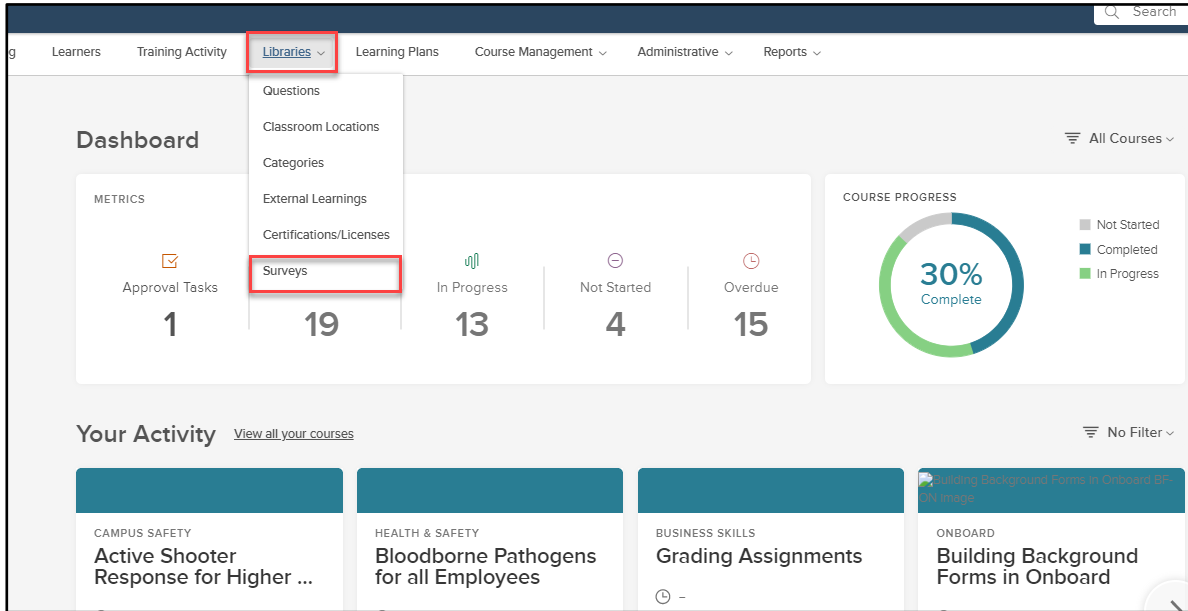


Figure 16: Libraries > Surveys

From the **Survey List**, select the name of the survey to access the **Survey Details Page**.

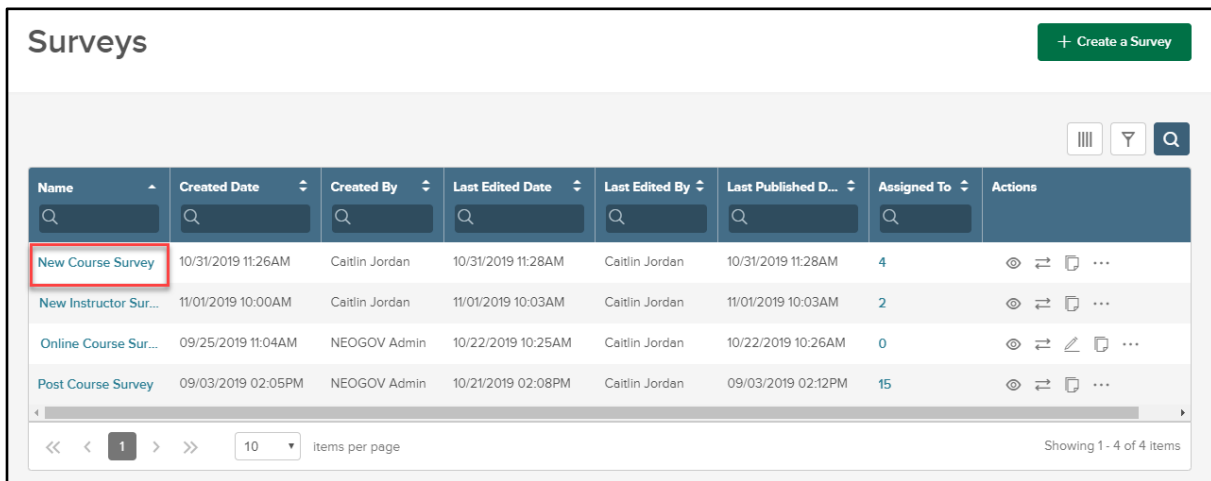


Figure 17: Surveys > Survey Name

The **Survey Details Page**, will display information for the survey including courses the survey is assigned to, survey metrics, and survey details.

Back to Survey Library

New Course Survey

Assign Survey Preview Survey Analyze Results More Actions

1 2 3 4 5

Course Category	Course Name	Course Code	Delivery Met...	Duration	Actions
Learn	Learn - Enrolling in a...	LE	Custom Online	-	6
Employment Liability	Manager Ethics	ME	Custom Online	-	
Business Skills	Mastering Excel 2010	BG21	Pre-built Online	-	
Business Skills	Mastering Microsoft ...	BG30	Pre-built Online	-	

10 Items per page Showing 1 - 4 of 4 items

Metrics

Total Responses **7** Completion Rate **8**

11 **91%**

Survey Details **9**

2 WEEKS EXPIRATION PERIOD

ACTIVE **10**

LAST EDITED ON 10/31/2019 11:28:00 BY CAITLIN JORDAN **11**

LAST PUBLISHED ON 10/31/2019 11:28:00 BY CAITLIN JORDAN **12**

Figure 18: Survey Details Page

1. **Course Category:** The Category the course is assigned to.
2. **Course Name:** Name of the course.
3. **Course Code:** The unique course code
4. **Delivery Method:** Course type: Custom Online, Pre-Built Online, or Classroom.
5. **Duration:** The duration of the course set in the course settings.
6. **Actions – Analyze Data & Delete:** Analyze Data by selecting the bar graph icon and delete by selecting the trash can icon.
7. **Total Responses:** Total number of respondents who have completed the survey.
8. **Completion Rate:** The percentage of users who have access to the survey who have completed it.
9. **Expiration Period:** The window of time available to complete the survey after the completion of the course.
10. **Active:** Whether the survey is 'Active' or 'Inactive'.
11. **Last Edited Data:** The information for the last date the survey was edited, including the date, time, and by which user.
12. **Last Published Date:** The information for the last date the survey was published, including the date, time and user.

Select **Analyze Results** to view the survey data.

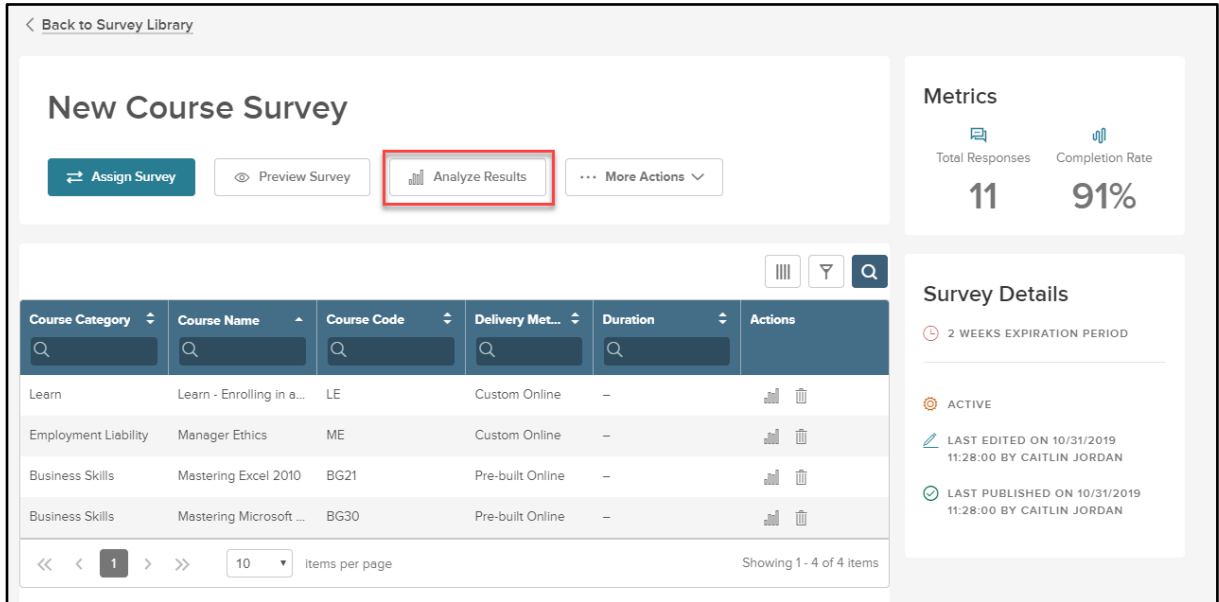


Figure 19: Survey Details Page > Analyze Results

Once on the Analyze Results page, select the course for which you want to analyze the survey data for via the course dropdown.

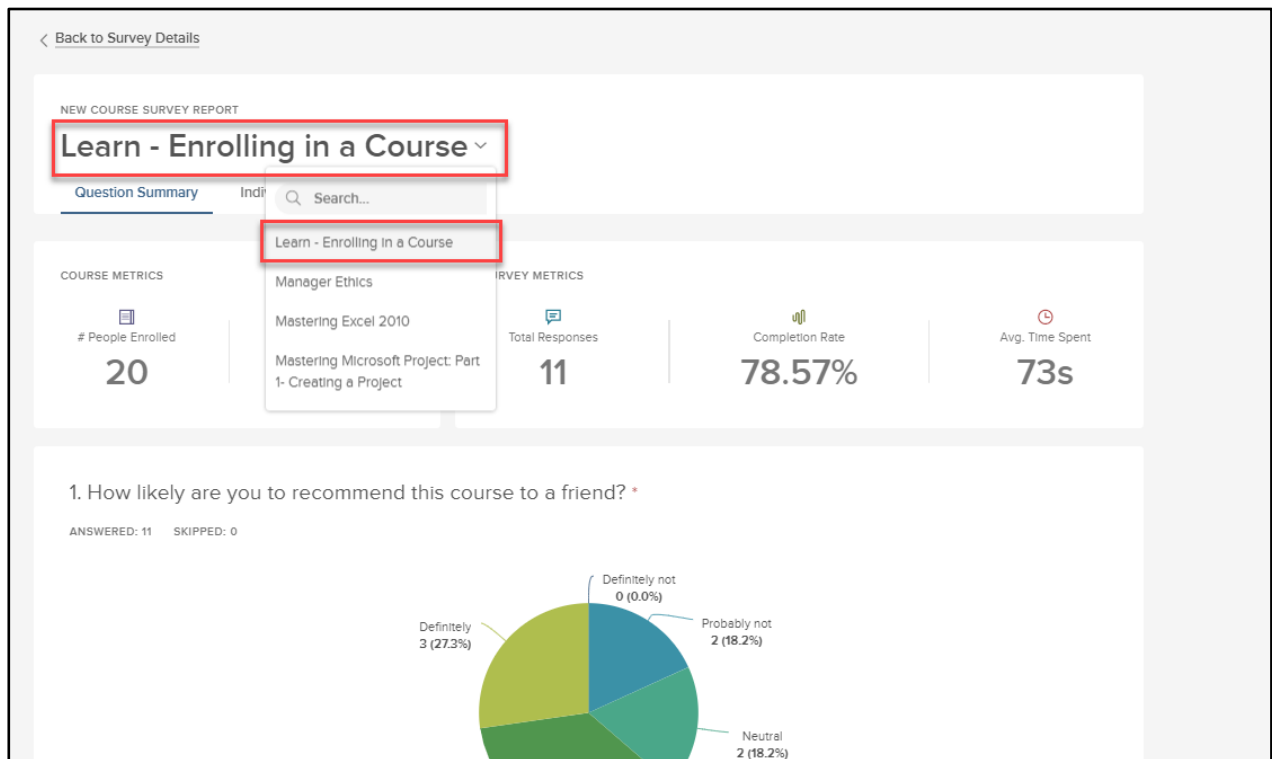


Figure 20: Course Dropdown

Or, select the Analyze Results icon to the right of the course under actions to view that course's data.

< Back to Survey Library

New Course Survey

[Assign Survey](#)
[Preview Survey](#)
[Analyze Results](#)
[More Actions](#)

Metrics

Total Responses: **11**

Completion Rate: **91%**

Survey Details

2 WEEKS EXPIRATION PERIOD

ACTIVE

LAST EDITED ON 10/31/2019 11:28:00 BY CAITLIN JORDAN

LAST PUBLISHED ON 10/31/2019 11:28:00 BY CAITLIN JORDAN

Course Category	Course Name	Course Code	Delivery Met...	Duration	Actions
Learn	Learn - Enrolling in a...	LE	Custom Online	-	
Employment Liability	Manager Ethics	ME	Custom Online	-	
Business Skills	Mastering Excel 2010	BG21	Pre-built Online	-	
Business Skills	Mastering Microsoft ...	BG30	Pre-built Online	-	

Showing 1 - 4 of 4 items

Figure 21: Course Table > Analyze Results Icon



To avoid having to select the course name from the dropdown, select Analyze Results directly from Course Information table next to the course within the Survey Details page!

Once the correct course name is displaying, view the data via the **Question Summary** or the **Individual Responses**.

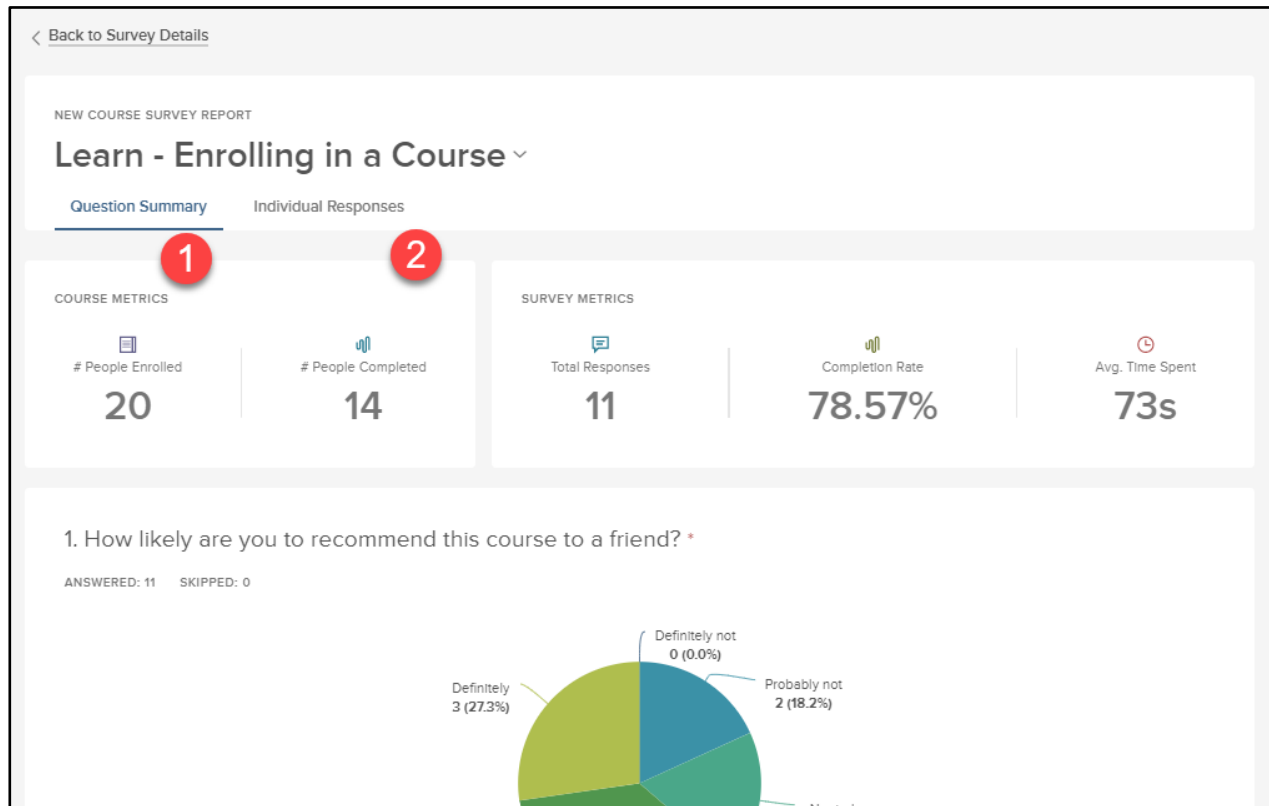


Figure 22: Question Summary & Individual Responses

- 1. Question Summary:** Response data for each individual survey question. Respondent information is not included in this view.
- 2. Individual Responses:** A breakdown of all responses by each individual respondent.

Viewing the data via the **Question Summary** displays **Course Metrics** and **Survey Metrics** specific to the survey responses for the course selected.

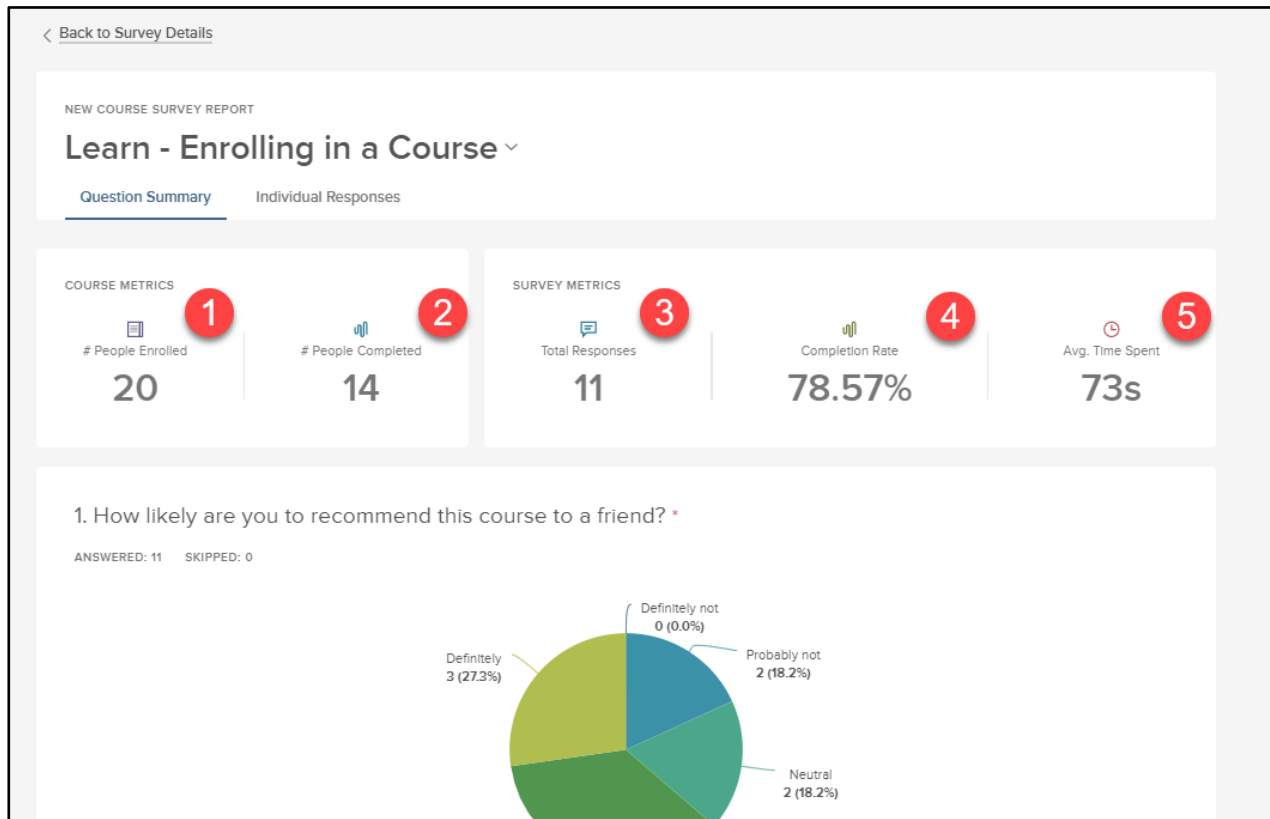


Figure 23: Course Metrics & Survey Metrics

Course metrics

- # of People Enrolled:** The total number of learners enrolled in the course.
- # of People Completed:** The total number of learners who have completed the course.

Survey Metrics

- Total Responses:** The total number of learners who have completed the survey for this course.
- Completion Rate:** The percentage of users who completed the course who have also completed the survey.
- Avg. Time Spent:** The average amount of time learners spent on the survey.

Scroll down to view response data for each question included in the survey. Below each question, the number of learners who responded and skipped the question will display.

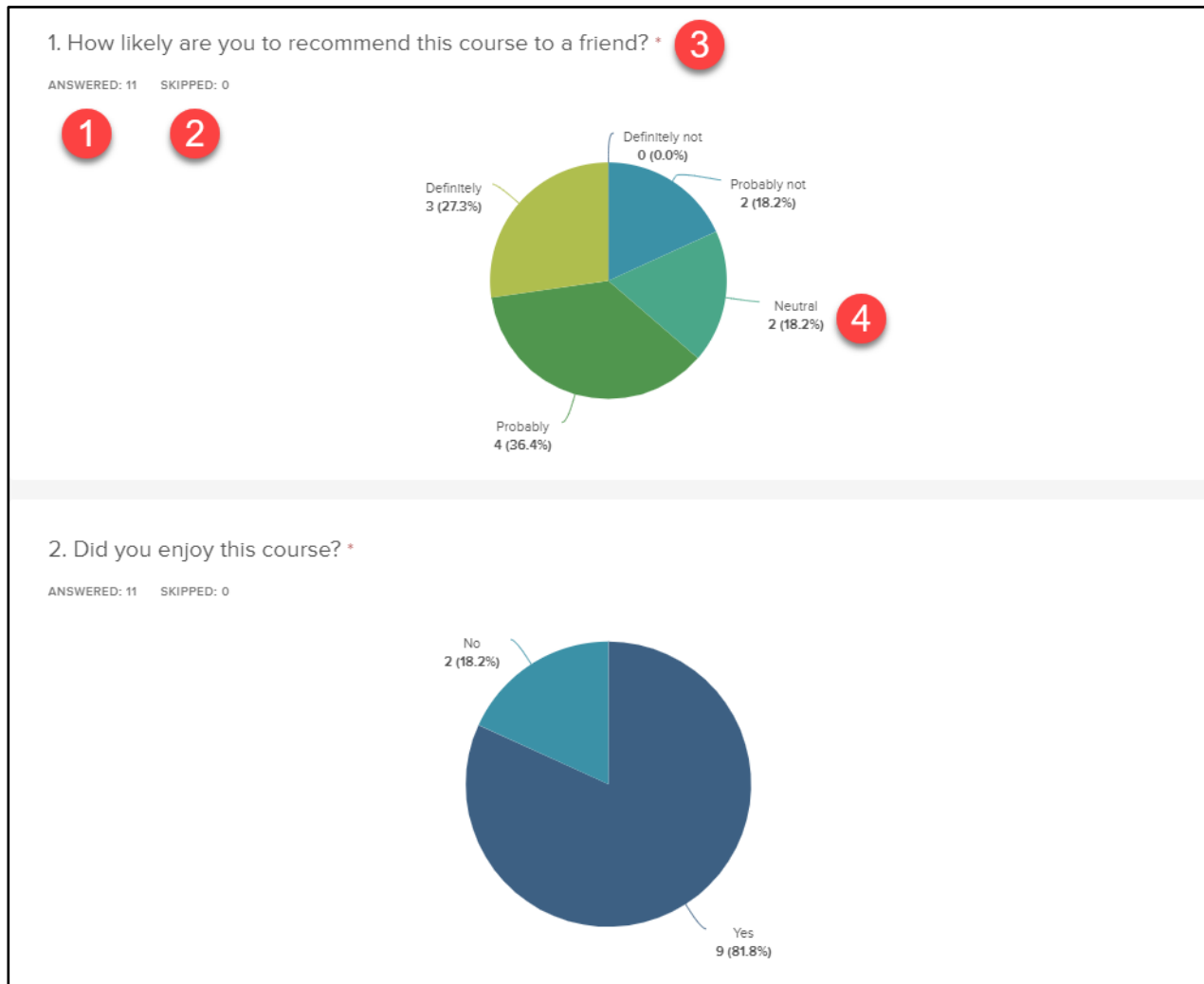


Figure 24: Question Summary Report

- 1. Answered:** The total number of learners who answered this question.
- 2. Skipped:** The total number of learners who skipped this question.
- 3. Required:** The red asterisk next to the survey question indicates that the question is required in order for learners to complete the survey.
- 4. Answer Data:** The total number of learners who selected the answer choice and the percentage of learners out of all respondents who selected that answer choice.

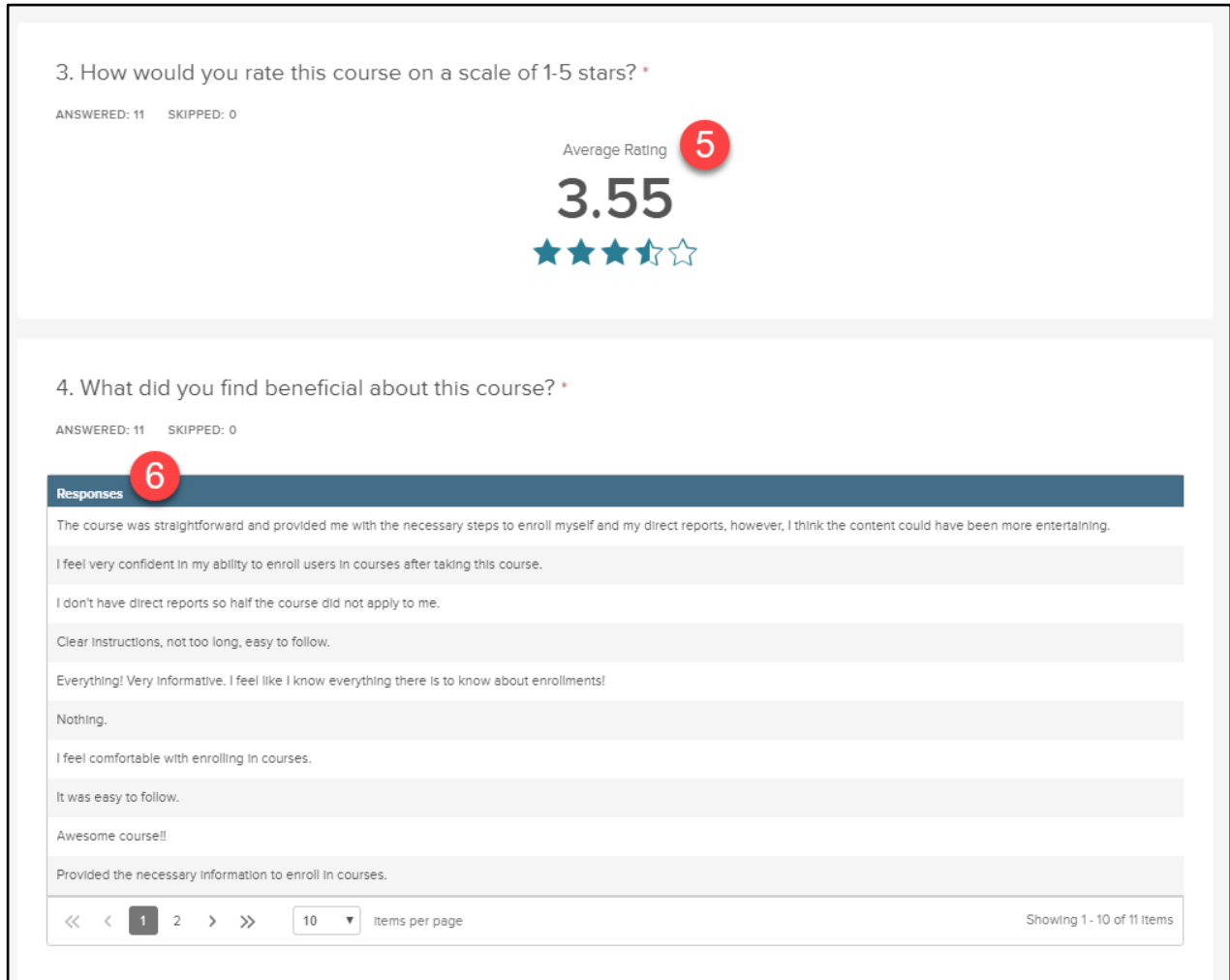


Figure 25: Question Summary Report

- 5. **Average Rating:** If a star rating is being used, the average rating of all responses will display.
- 6. **Comment Responses:** If a comment box is included in the survey, the responses will display in a table below the question.



Use the Individual Responses tab to view which Learners left the comments listed in the table.

Navigate to the **Individual Responses** tab above the Course and Survey Metrics.

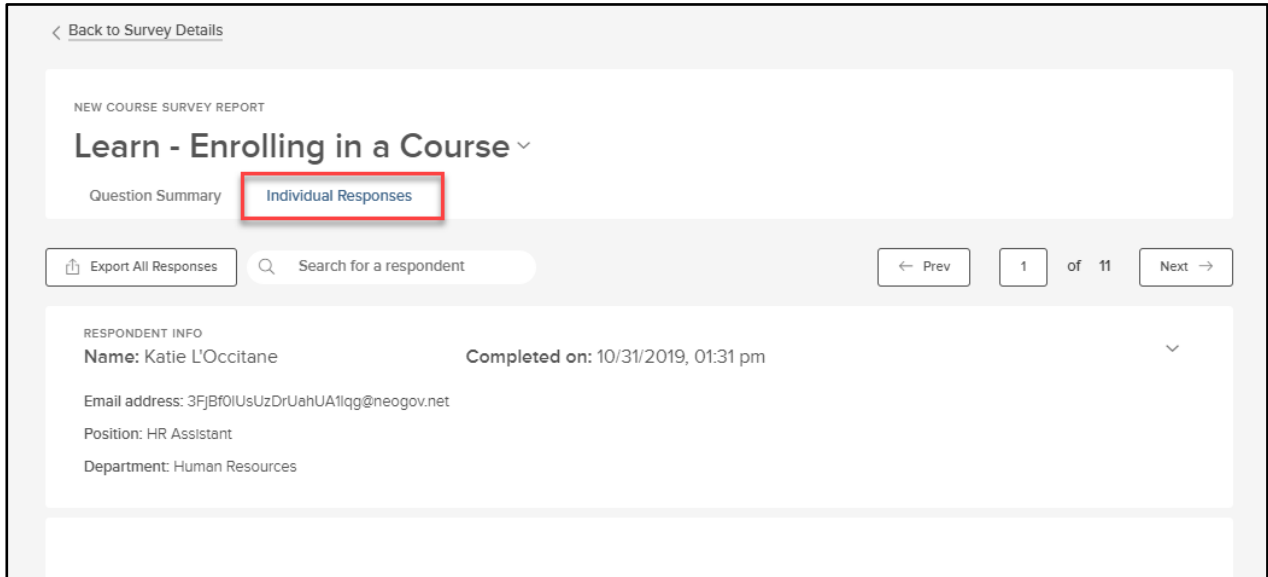


Figure 26: Individual Responses

The **Individual Responses** tab breaks down the response data by the respondent. To export the response data of each question by respondent, select **Export All Responses**.

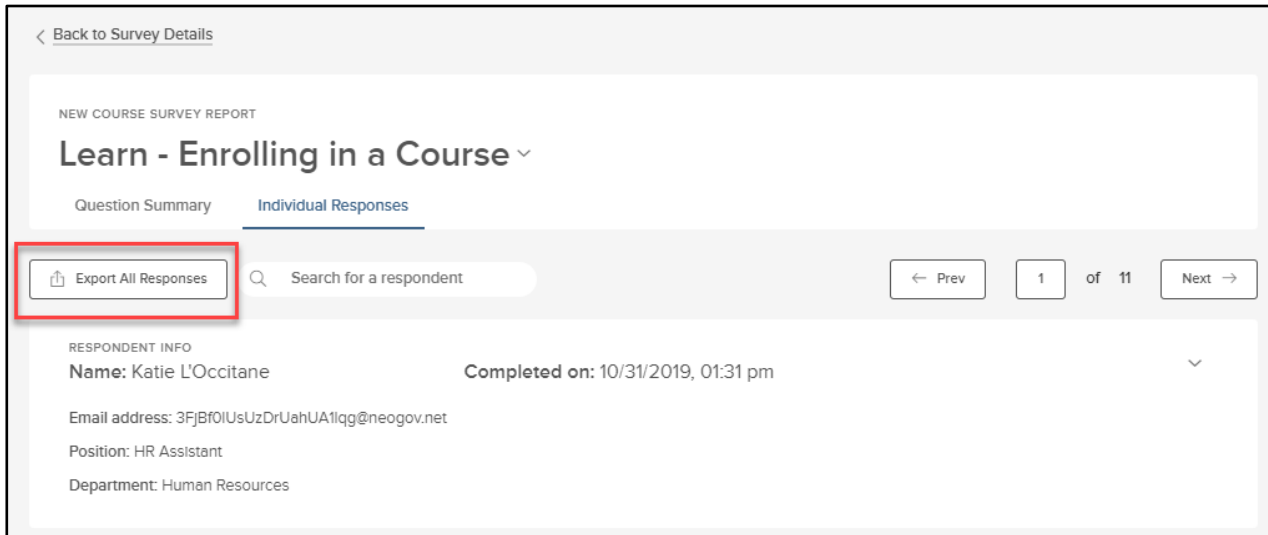


Figure 27: Export All Responses

The data is exported into an Excel Document that includes the Learner information with that individuals responses to each question. If **Hide Respondent Identities** is toggled to 'ON', the respondent information will not display.

Completed Date	Name	Email Address	Position	Department	Q1: How likely are you to recommend this course to a friend? *	Q2: Did you enjoy this course? *	Q3: Any additional comments? *	Q4: What did you find beneficial about this course? *	Q5: How would you rate this course on a scale of 1-5 stars? *	Active	Supervisor Name	Time Spent	Position Code	Department Code	Class Spec
10/31/2019 1:31 PM	Katie L'Occitane	[REDACTED]	HR Assistant	Human Resources	Neutral	Yes	n/a	Good info.	4 Stars	Yes	Jim Halpert	00m 44s	HR2	HR	Custodian
10/31/2019 1:30 PM	Kaitlin Holmes	[REDACTED]	Executive Assistant	Office of the City Manager	Neutral	Yes	None	Provided the necessary information to enroll in courses.	3 Stars	Yes	Ben Wyatt	00m 24s	CM3	CM	
10/31/2019 1:28 PM	Caaitlin Jordan	[REDACTED]	HR Director	Human Resources	Definitely	Yes	None	Awesome course!	5 Stars	Yes	Pamela Beasley	00m 21s	HRD	HR	Human Reso
10/31/2019 1:11 PM	Alexie Ricci	[REDACTED]	Information Technology Manager	Information Technology	Probably	Yes	More courses that walk through	It was easy to follow.	3 Stars	Yes	Marcus Egeke	07m 31s	IT2	IT	
10/31/2019 12:58 PM	Allie Paul	[REDACTED]	Information Technology Associate	Information Technology	Probably	Yes	No. Good course.	I feel comfortable with enrolling in courses.	4 Stars	Yes	Annie Ricci	00m 30s	IT3	IT	
10/31/2019 12:55 PM	Ron Swanson	[REDACTED]	Parks and Recreation Director	Parks and Recreation	Probably not	No	No.	Nothing.	2 Stars	Yes	Chris Traeger	00m 25s	PR1	PR	
10/31/2019 12:50 PM	Leslie Knope	[REDACTED]	Parks and Recreation Deputy Direc	Parks and Recreation	Definitely	Yes	Awesome course! Can't wait for more to come out!	Everything! Very informative. I feel like I know everything there is to know about enrollments!	5 Stars	Yes	Ron Swanson	00m 46s	PR2	PR	
10/31/2019 11:53 AM	April Ludgate	[REDACTED]	Parks and Recreation Deputy Direc	Parks and Recreation	Probably	Yes	Can we have a similar course for HR Admins who will be enrolling	Clear instructions, not too long, easy to follow.	4 Stars	Yes	Leslie Knope	00m 42s	PR2	PR	
10/31/2019 11:51 AM	Tom Haverford	[REDACTED]	Parks and Recreation Associate	Parks and Recreation	Probably not	No	n/a.	I don't have direct reports so half the course did not apply to me.	2 Stars	Yes	April Ludgate	00m 29s	PR4	PR	
10/31/2019 11:50 AM	Ben Wyatt	[REDACTED]	Assistant City Manager	Office of the City Manager	Definitely	Yes	None.	I feel very confident in my ability to enroll users in courses after taking this course.	4 Stars	Yes	Chris Traeger	00m 33s	CM2	CM	
10/31/2019 11:48 AM	Chris Traeger	[REDACTED]	City Manager	Office of the City Manager	Probably	Yes	Great course!	The course was straightforward and provided me with the necessary steps to enroll myself and my direct reports. However, I think the content could have been more entertaining.	3 Stars	Yes		01m 01s	CM1	CM	

Figure 28: Export File

1. **Completion Date:** Date the respondent completed the survey.
2. **Name:** Name of the respondent.
3. **Email Address:** Respondent’s email address.
4. **Position:** Respondent’s position.
5. **Department:** Respondent’s department.
6. **Question Responses:** The response to each question by the respondent.
7. **Active:** Whether the respondent is active or inactive.
8. **Supervisor Name:** Name of the respondent’s supervisor.
9. **Time Spent:** Time spent on the survey.
10. **Position Code:** Position code assigned to the respondent’s position.
11. **Department Code:** Department code assigned to the respondent’s department.
12. **Class Spec:** Respondent’s Class Spec.

Use the **Prev** and **Next** icons to navigate between respondents. Search for a specific respondent using the **Search for a respondent** search bar. Below, the **Respondent’s Info** will display including the respondent’s name, email address, position, department, and the date they completed the survey.

Back to Survey Details

NEW COURSE SURVEY REPORT

Learn - Enrolling in a Course

Question Summary Individual Responses

Export All Responses Search for a respondent 1 7 ← Prev 1 of 8 Next →

RESPONDENT INFO

Name: Katie L'Occitane **Completed on:** 10/31/2019, 01:31 pm

Email address:

Position: HR Assistant

Department: Human Resources

Figure 29: Individual Responses, Respondent Info

1. **Search for a respondent:** Search for a specific respondent.
2. **Name:** Name of the survey respondent.
3. **Email Address:** Respondent’s email address.
4. **Position:** Respondent’s position.
5. **Department:** Respondent’s department.
6. **Completed on:** Date the respondent completed the survey.
7. **Prev:** Navigate to the previous respondent.
8. **Next:** Navigate to the next respondent.

Reports

Administrators can also view **Survey Reports** via the **Reports Dropdown**. Select **Reports**, then **Survey**.

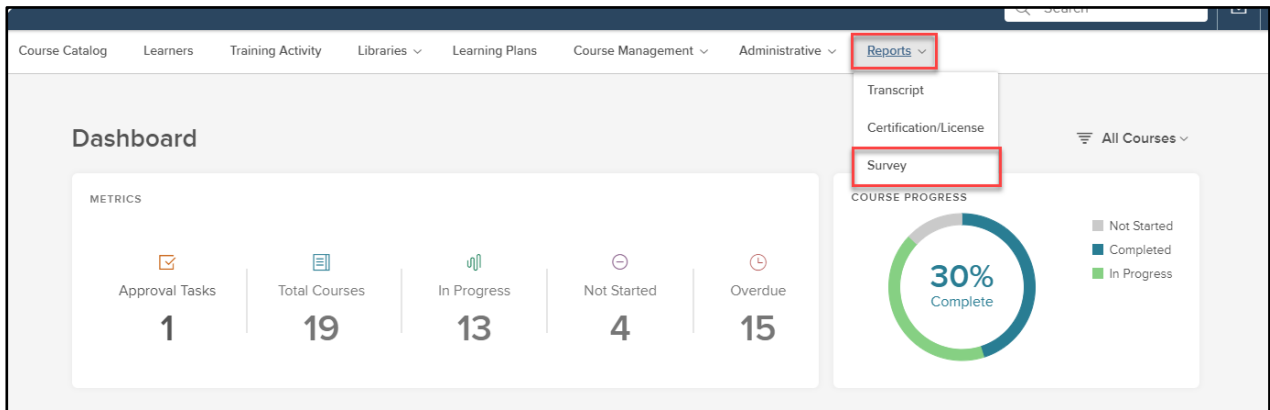


Figure 30: Reports > Surveys

Accessing survey reports this way breaks the reports down by **Survey** or by **Courses**. Selecting **Survey** displays a list of all surveys with information specific to that survey included in the table.

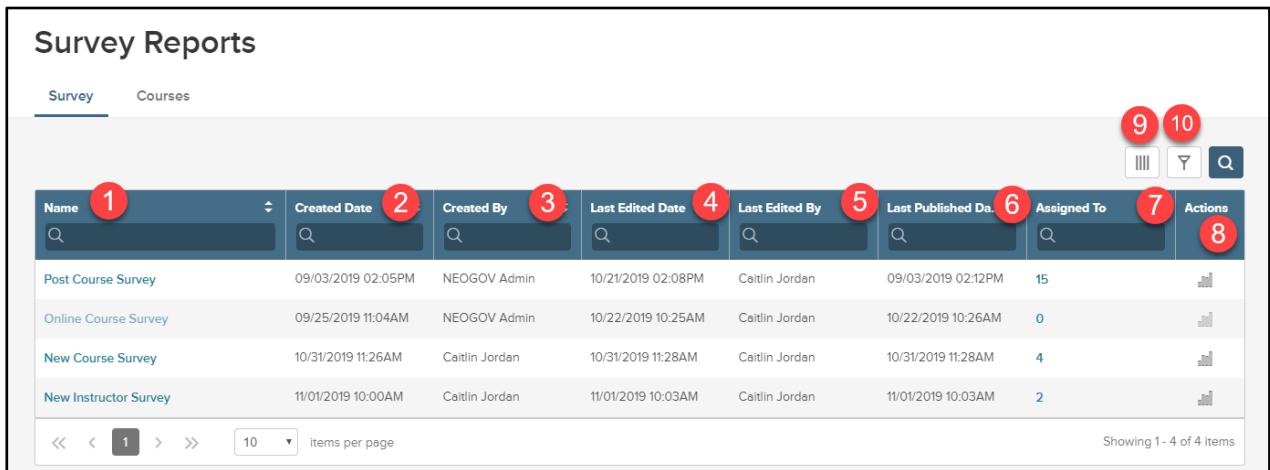


Figure 31: Survey Reports by Survey tab

1. **Name:** Name of the survey.
2. **Created Date:** Date the survey was created.
3. **Created By:** Who created the survey.
4. **Last Edited Date:** Date the survey was last edited.
5. **Last Edited By:** Who edited the survey last.
6. **Last Published Date:** Date the survey was last published.
7. **Assigned to:** How many courses the survey is assigned to.
8. **Actions:** Analyze data by selecting the icon under actions.

To view the survey data, select the survey name or select the **Analyze Data** icon under actions.

Survey Reports

Survey Courses

Name	Created Date	Created By	Last Edited Date	Last Edited By	Last Published Da...	Assigned To	Actions
Post Course Survey	09/03/2019 02:05PM	NEOGOV Admin	10/21/2019 02:08PM	Caitlin Jordan	09/03/2019 02:12PM	15	
Online Course Survey	09/25/2019 11:04AM	NEOGOV Admin	10/22/2019 10:25AM	Caitlin Jordan	10/22/2019 10:26AM	0	
New Course Survey	10/31/2019 11:26AM	Caitlin Jordan	10/31/2019 11:28AM	Caitlin Jordan	10/31/2019 11:28AM	4	
New Instructor Survey	11/01/2019 10:00AM	Caitlin Jordan	11/01/2019 10:03AM	Caitlin Jordan	11/01/2019 10:03AM	2	

Showing 1 - 4 of 4 items

Figure 32: Analyze course survey results

On the next page, follow the same steps of selecting the course to view the survey data via the **Question Summary** or via **Individual Responses**.

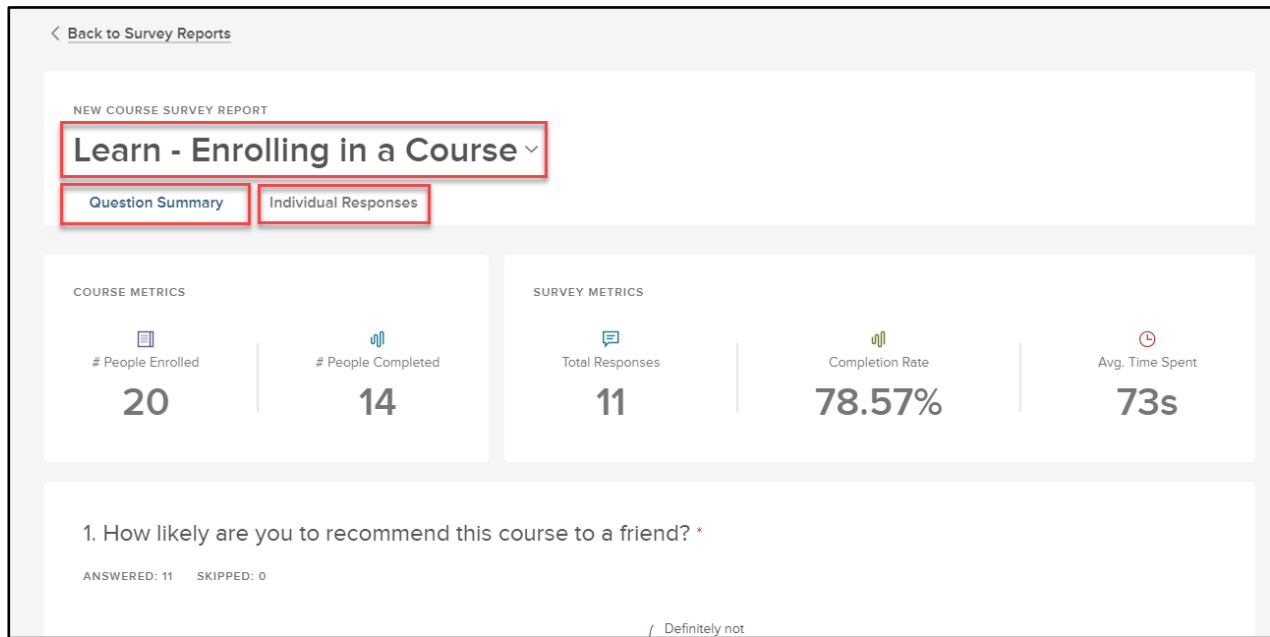


Figure 33: Course Survey Reports

The **Courses** tab allows you to search for survey data by course, rather than by the survey assigned to the course. Select **Courses** to view a table of all courses that currently have a survey assigned.

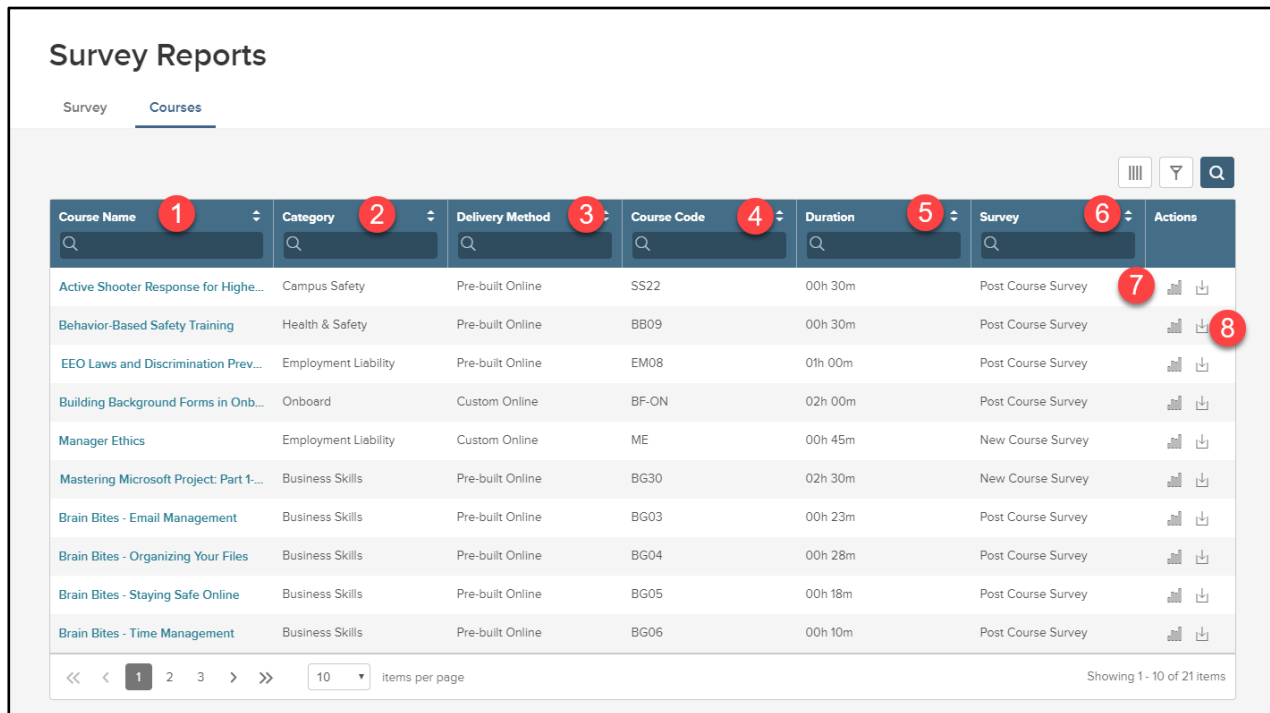


Figure 34: Survey Reports > Courses Table

- 1. Course Name:** Name of the course.
- 2. Category:** Category the course is assigned to.
- 3. Delivery Method:** Course type: Custom Online, Pre-Built Online, or Classroom.

4. **Course Code:** Unique course identifier code.
5. **Duration:** Duration of the course via the course settings.
6. **Survey:** Survey assigned to the course.
7. **Analyze Results:** Access survey responses to view data by question summary or individual responses for the course.
8. **Export Response Data:** Export all response data for the course by respondent.

Select the **Course Name** or the **Analyze Results** icon under actions to view the survey reports for the course.

The screenshot shows the 'Survey Reports' page with a 'Courses' tab selected. A table lists various courses with their details and associated surveys. The 'Learn - Enrolling in a Course' row is highlighted with a red box, and the 'Analyze Results' icon in the 'Actions' column for that row is also highlighted with a red box.

Course Name	Category	Delivery Method	Course Code	Duration	Survey	Actions
Perform Training	Perform	Classroom	PT	N/A	New Instructor Survey	
Advanced QuickBooks (2016)	Business Skills	Pre-built Online	BG01	05h 15m	Post Course Survey	
Basic Business Finance Principles	Business Skills	Pre-built Online	BG02	01h 00m	Post Course Survey	
Mastering Excel 2010	Business Skills	Pre-built Online	BG21	10h 00m	New Course Survey	
Microsoft Word Lab	Business Skills	Classroom	MWL	01h 00m	Post Course Survey	
Learn-Manager Training	Learn	Classroom	LMT	01h 00m	New Instructor Survey	
Defining Useful Workplace Feedba...	Human Capital	Pre-built Online	BV33	00h 20m	Post Course Survey	
Creating a Total Service Experience	Human Capital	Pre-built Online	BV04	00h 20m	Post Course Survey	
Customer Service for the Experien...	CJER	Custom Online	CJERCSX	N/A	Post Course Survey	
Learn - Enrolling in a Course	Learn	Custom Online	LE	N/A	New Course Survey	

Figure 35: Analyze Course Survey Data

From there, view the survey results by **Question Summary** or **Individual Responses**.

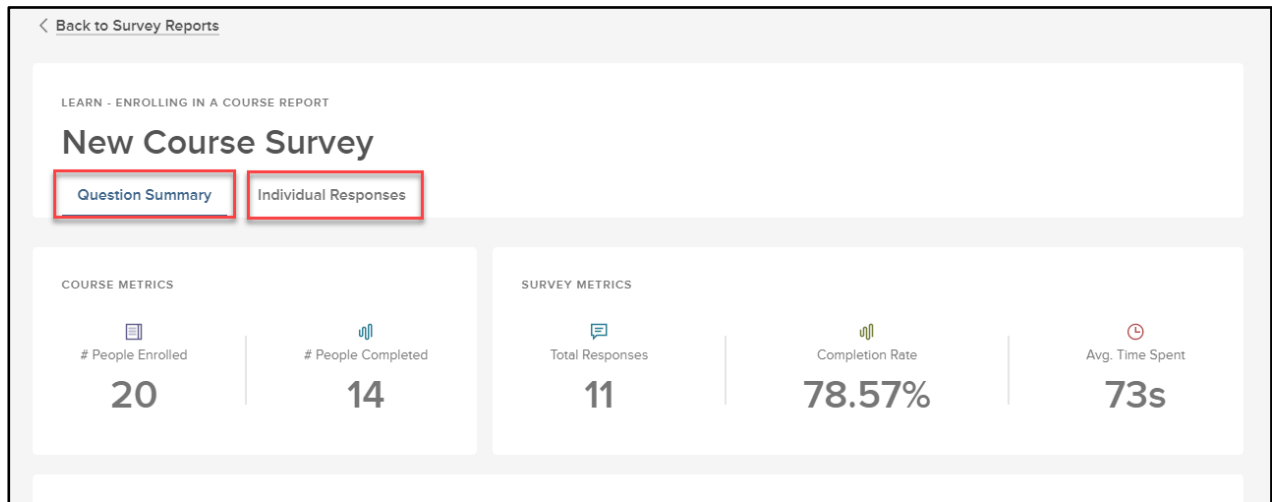


Figure 36: Survey Reports for course