

BYOL: Next Generation Assessment Authoring Using Demographics and Jump Blocks

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In this session we will be creating a short survey that asks people to identify their department, and then presents certain questions to them based upon their answers. After being presented with their department specific question(s) they will see general questions that are presented to everyone, regardless of department selected.

In addition to using the selected department to decide which questions to present, we will be assigning their answer as a special field, which will allow us to filter reports based on their selection.

The key features you will be exploring during this session are:

- Jump Blocks
- Special Fields

Other features we will be using include

- Topics
- Question Blocks
- Demographics filters when reporting

Step 1 – Create your topics

As we will be creating a survey based on a person's department, we will need to create our topics accordingly. Note that because we are all using the same server, you will first need to create a topic named for yourself to keep your work separate from everyone else, and then create your topics for this exercise within it. Your topics should look similar to what is shown below.

- ▲ Rick
 - ▢ Demographics
 - ▢ Accounting
 - ▢ Marketing
 - ▢ Sales
 - ▢ CompanyWide

*Topics will automatically alphabetize when the screen view is refreshed.

Step 2 – Create the demographic question

We will be asking people to choose their department from a list of options. While any question type could be used to capture demographic values, in this example we will be using a basic multiple choice question.

Within your demographics topic, create a multiple choice question similar to the one shown below. Don't forget to set it as unscored.



Choose your department from the list below:

- Accounting ✘
- Marketing ✘
- Sales ✘

Step 3 – Create your department specific questions

Next you will need to create a question or two within each topic that is specific to that department. This can be as simple as a Yes/No question asking “Do you enjoy working in accounting?”. Note that for this exercise, the content of the department specific questions doesn’t really matter. However, you do want to make the questions clearly specific to the department, so that it will be obvious that the jump blocks we create are working correctly.

Create a department specific question for each of the departments in your topic tree. A basic example is shown below:



Do you enjoy working in the accounting department?

- Yes 1
- No 0

Notice that the question above is set to score yes with 1 point. This is not critical to our example, but illustrates how scoring can be used effectively in a survey. For example, we could look at the average score for the topic in a report, to get a sense of overall satisfaction.

When creating questions for each of the departments, you might choose to copy and paste the first item, and simply change the department name.

Step 4 – Create the question(s) that all departments will see

You will also need to create a question that everyone will see, regardless of the department they choose. This could simply be another Yes/No question asking “Do you enjoy working for the company”. This question will be placed in the “Company wide” topic.



Do you like working for this company?

Yes

1

No

0

Step 5 – Create the assessment

We will be creating a survey that has a total of five question blocks. Each topic in your tree will have its own block, and within each block we will be adding the appropriate questions. The demographics topic will be the first question block, and the company wide topic will be the last question block. The order of the question blocks for each individual department is not important.

You should have an assessment structured as seen below. Note that the question blocks are collapsed and thus the items themselves are not visible.

Question blocks + Add ?

- +
+ Add ⚙ Settings ✕ Delete

When adding questions to each block, it is important that the demographics block call for individual items. This is so that we may assign the answer given to a specific question to a special field for use in a report. If the question block is calling for random questions, or all questions – even though there is only one – you will not be able to assign the demographic field.

Your demographic block should look similar to what is shown here:

+
+ Add ⚙ Settings ✕ Delete

Description ?

B I U x₂ x² [bullets] [lists] [undo] [redo] [link] [unlink] [table] [math] [percent] [link]

Enter a description for this question block

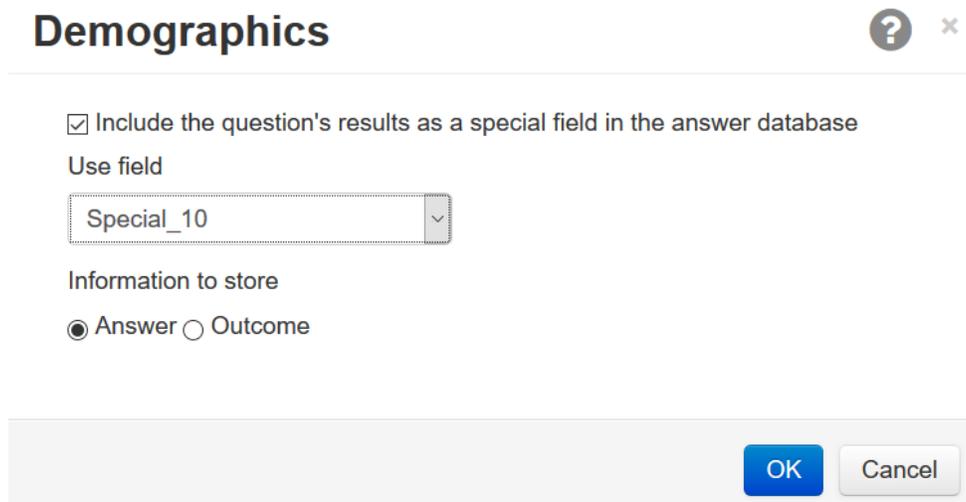
Question selections

Single question '1188715 - Normal - Choose your department from the list below:' from topic 'SLC training\Rick\Demographics'

Step 6 – Assign the demographic question response to a special field

Note the small button that looks like a chart on the right side of the line which calls for the specific item. This is the button that is used to designate the response to the question as a special field that can be used for reporting.

Click on the button and a dialog similar to the one shown below will open. This is where we can set the answer to be stored in a special field. Any one of the 10 fields may be used. By default, the participant's first name, last name, and email address are populated into special field 1, 2, and 3 respectively. For our example, we will use special field 10.



Demographics ? x

Include the question's results as a special field in the answer database

Use field

Special_10

Information to store

Answer Outcome

OK Cancel

Step 7 – Create the jump blocks for the demographic response

Next we will be creating jump blocks that will tell Questionmark to present the appropriate block based on the answer chosen to the demographics question. These jump blocks will need to be inserted within the demographic block, where we are asking the question. Each department in your demographic question will need a corresponding jump block that defines where to go if that answer is chosen. For example, if accounting is selected, we will be jumping to the accounting block.

Create a jump similar to the one shown below for each possible answer in your demographic question.

Jump block



Name

Accounting

Jump to

Accounting

Condition

If

Outcome + Add 0 Accounting

This block score Assessment score

less than points

OK

Cancel

When you are finished, your demographic block should look similar to this:

+ Add Settings Delete

Description

B I U X₂ X²

Enter a description for this question block

Question selections

Single question '1188715 - Normal - Choose your department from the list below:' from topic 'SLC training\Rick\Demographics'

Jump blocks

- Accounting - If this block outcome equals '0 Accounting' jump to Accounting
- Marketing - If this block outcome equals '1 Marketing' jump to Marketing
- Sales - If this block outcome equals '2 Sales' jump to Sales

Step 8 – Create the jump blocks to skip the other departments

Because the normal flow through an assessment is top to bottom through the question blocks, after someone submits their department specific block, they will be presented with the next block in the list. To make sure people only see the question blocks intended for their department, we will need to create additional jumps that skip the other departments and proceed to the company wide block instead. These jumps will not be dependent on any certain answer being chosen, but rather set to always happen.

We will be creating a jump similar to the one shown below in each of the department specific blocks.

Jump block ? x

Name

Jump to

Condition

This block score Assessment score

Your department specific question blocks will each look similar to this when you are finished:

Settings



General

Security

Item-level feedback

- Anonymous results
- Allow open access to assessment
- Allow run from integration
- Require Questionmark Secure
- Require monitoring

Scheduling password ([show](#))

OK

Cancel

Step 9 – Publish the assessment

Now that the assessment is complete, we will need to publish it to the delivery section of the server so that we will be able to see the jumps work, and capture results so that we may try filtering a report based on the department we select.

From the list of assessments, check the box to the left of your assessment name, and then click publish on the menu bar above the list of assessments. Wait a few moments for the assessment and related content/items to be copied to the delivery area. When the process is finished, you should see a green bar across the top of your screen indicating success.

Step 10 – Take the assessment

After the assessment has been published it is ready to be taken. Because we are using the open delivery method we do not need a user account or schedule to take the survey. Instead, we will simply provide a name when we login, and choose which assessment we want to take. Open delivery uses a different URL to access the assessment, which will be as follows, where ### is the Questionmark OnDemand area number.

<https://ondemand.questionmark.com/#####/open>

The open delivery portal will ask for a name and a group to login. Any name may be used, and group is optional. Once you have provided a name and click on “enter” you will be presented with a list of all the open assessments available within the area. You should see your survey in the list. Click on your assessment to launch it, and complete the survey. You might want to take it a couple of times, and choose different departments each time so that you’ll be able to try filtering a report using the different demographics/special fields.

Step 11 – Sample a report by filtering on special fields

For simplicity in our demonstration, we will be using an assessment overview report to look at the aggregate responses (unfiltered) and then we will run the same report again to see that we may filter results based on the answer give to our demographic question. The ability to filter based on special fields is not specific to any given report – it can be done in nearly all of them. Time permitting, try exploring any of the other reports and filter the results based on the departments you have selected.

Note that some of the analytics will also separate data based on special fields, but new results are not available within analytics until the ETL process has picked up the results and loaded them to the results warehouse. You may need to wait from several minutes to an hour or so before your recently completed survey results are available in the analytics dashboards.