An introduction to the Assessment Module

North American User Meeting - October 2019

Kate Byrne
VP, Product Management
kate@symplectic.co.uk

SYMPLECTIC
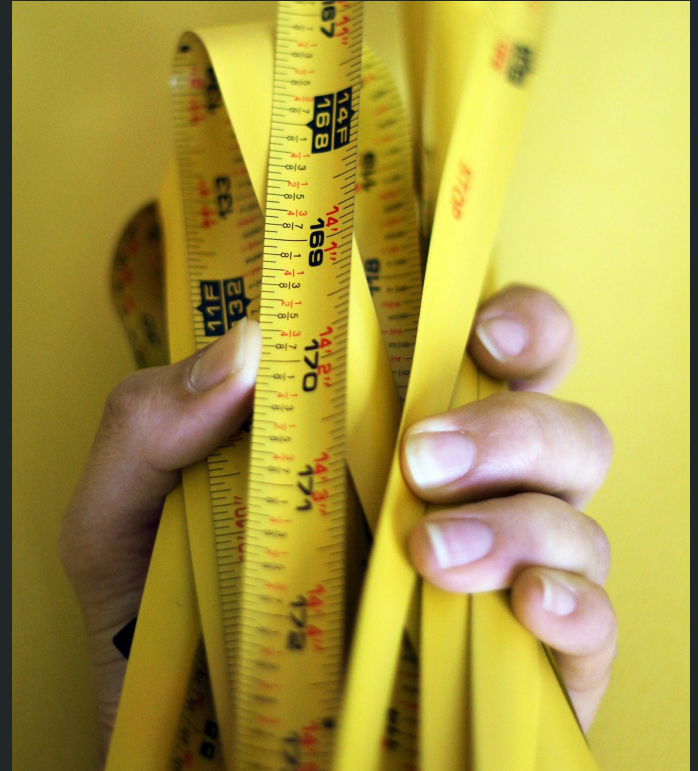
Part of **DIGITAL**SCIENCE

Session Agenda

- An introduction to the Assessment Module

- Client case study: Things to consider when rolling out the Assessment Module
    - Speaker: David Scherer, Carnegie Mellon University

What's it for?

Not just about measurement

Review Process

Survey

Assessment

Acknowledgement Request

Document

What's the difference?

They are all different kinds of "assessments" that can be managed within the module. **Similar to the way you can have different kinds of publication 'types', you can have different types of assessments.**

Practically speaking, the difference is mostly just about terminology. Choosing the **'type' determines how the exercise will be described in the UI**, setting user's expectations over what the process will be.

There is one key functional difference, exercises of the 'Document' type will not have a corresponding home page action prompting users to complete the exercise.

A glossary of terms

Assessment Exercise is the activity the user will be asked to complete. They are typically made up of a range of fields including lists for making selections and supplementary information.

Lists are collections of items that you select, create, edit, order and manage. Example names of lists includes Research Outputs, Creative Outputs, NROs, and/or Narratives.

Items can be selected from Elements objects like individual Publications, Professional Activities, Teaching Activities, Impact and Grants or 'fields only' which are created within the Exercise. These items not in Elements might be private and confidential and only exist in an Assessment Exercise. Items can be ordered and supplemented with additional information

Supporting Fields are objects not sourced from Elements, but created within an Assessment.

Units are a way of subdividing an assessment in predefined groups & varying some configurations per unit.

SYMPLECTIC

An overview of Assessment Module Roles

Users are the people being asked to complete the exercise. They are added on the Users tab of the Exercise definition

Reviewers are the Elements Users who are being asked to review the submissions during one or more stages of the assessment. They are added on the Stages tab of the definition.

Assessment Managers can manage the submission and review processes for each exercise. They are added under the Managers tab of the Exercise definition. You may wish to also give them the 'Research Manager' (under System Roles), so they can also impersonate users within the relevant group.

Assessment Administrators can configure exercises and manage roles. They are added under Manage System Roles (System Admin menu).

SYMPLECTIC

Part of **DIGITAL** science

Before you start...

Consider what data you actually need to collect.

- Faculty are less likely to engage and are more likely to feel frustrated if the forms are long and complex. Only collect data you know you're going to use.

- Consider whether any of the data you want to collect can be fed in from other systems.

SYMPLECTIC

Getting started configuring an exercise 1/2

1. **Create the exercise**
   a. Start with a template and edit from there, or create a new one from scratch.
   b. Add a name, choose an exercise type and add some guidance text.
   c. Decide whether you want to create 'units'

2. **Add one or more 'lists'**
   a. Choose whether to add on 'lists' for each type of data you would like the user to select
   b. Choose whether to add a 'no-items list' - made up of Supporting Fields and used to store data that is only entered in an Assessment Exercise.

3. **Add one or more 'supporting fields'.**
   a. Can be created for an exercise, a list or an item.
      i. Exercise Supporting Fields: Overall summary fields for each exercise submission.
      ii. List Supporting Fields: Summary fields for a collection of items in a list
      iii. Item Supporting Fields: Fields relating to each selected item.

SYMPLECTIC

Getting started configuring an exercise 2/2

4.   Create Stages to structure your workflow

     a.   Can be simple one step process or a multi-stage process with several rounds of review

     b.   Configure reviewers and user permissions for each stage.

5.   Assign Users and Managers

     c.   Assign users and managers by group or individually.

6.   Configure the optional extras

- Add a scoring schema
- Configure permitted attachment types
- Configure Units including unit memberships and overrides
- Configure warnings and prompts
- Set up Assessment Reports

SYMPLECTIC

Demo

Questions?

SYMPLECTIC

Part of **DIGITAL** science