



Admin Job Aid: Configure Course Feedback Options and Email Notifications

(Revision date: September 12, 2020)

Purpose

The purpose of this job aid is to guide you through the step-by-step process of changing settings for Course Feedback options and email notifications. There is a separate job aid for setting Follow-up Survey options and email notifications.

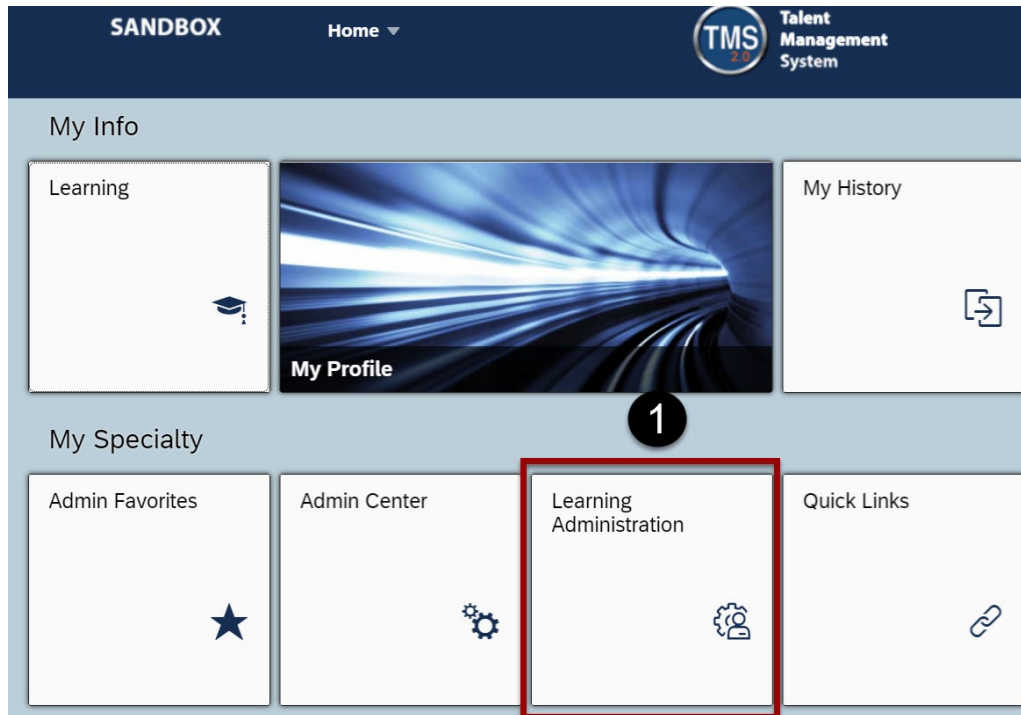
In this job aid, you will learn how to:

- Task A. Access a Survey
- Task B. Set Course Feedback Options
- Task C. Configure Email Notification Settings

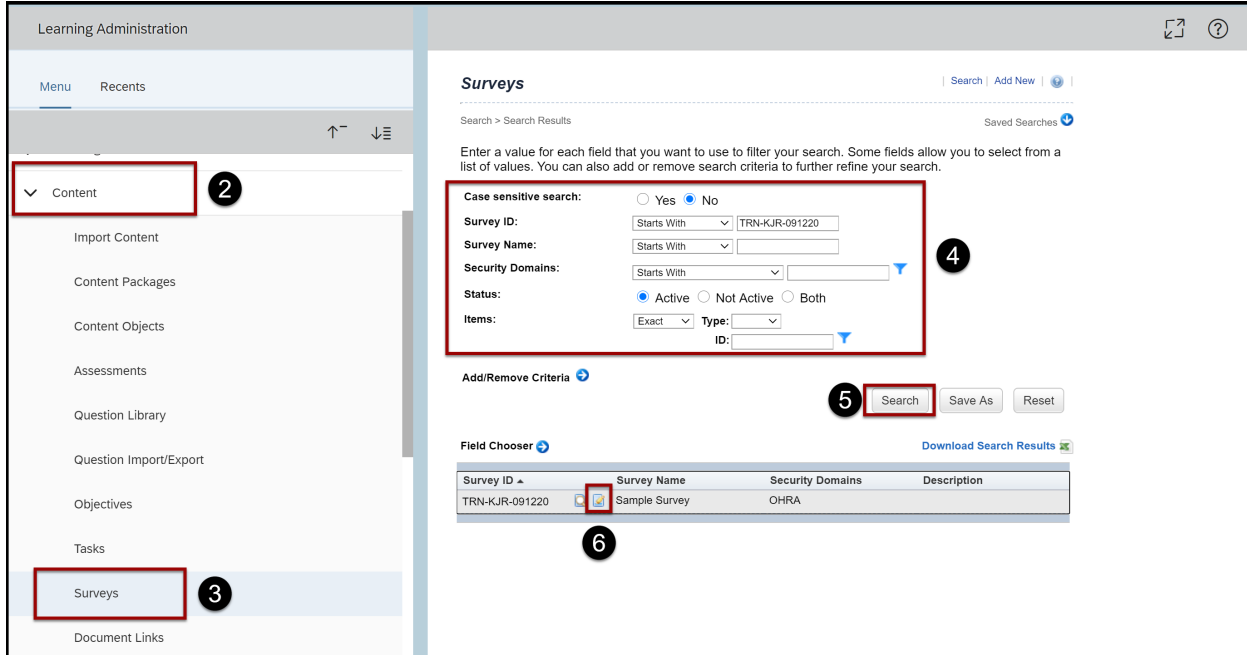


Task A. Access Learning Administration

1. Select the **Learning Administration** link.



2. Select the **Content** menu.
3. Select **Surveys**.
4. Use the **search filters** to find your survey.
5. Once you've entered the desired search information, select **Search**.
6. In the search results, select the **Edit** icon next to the desired survey.



The screenshot displays the 'Learning Administration' interface. On the left, the 'Menu' tab is active, showing a list of options. The 'Content' menu is expanded, and the 'Surveys' option is highlighted. The main area shows the 'Surveys' search page with various filters and a search button. The search results table is visible at the bottom, showing a single entry with an 'Edit' icon next to it.

Search Filters:

- Case sensitive search: ☐ Yes ☒ No
- Survey ID: Starts With
- Survey Name: Starts With
- Security Domains: Starts With
- Status: ☒ Active ☐ Not Active ☐ Both
- Items: Exact Type: ID:

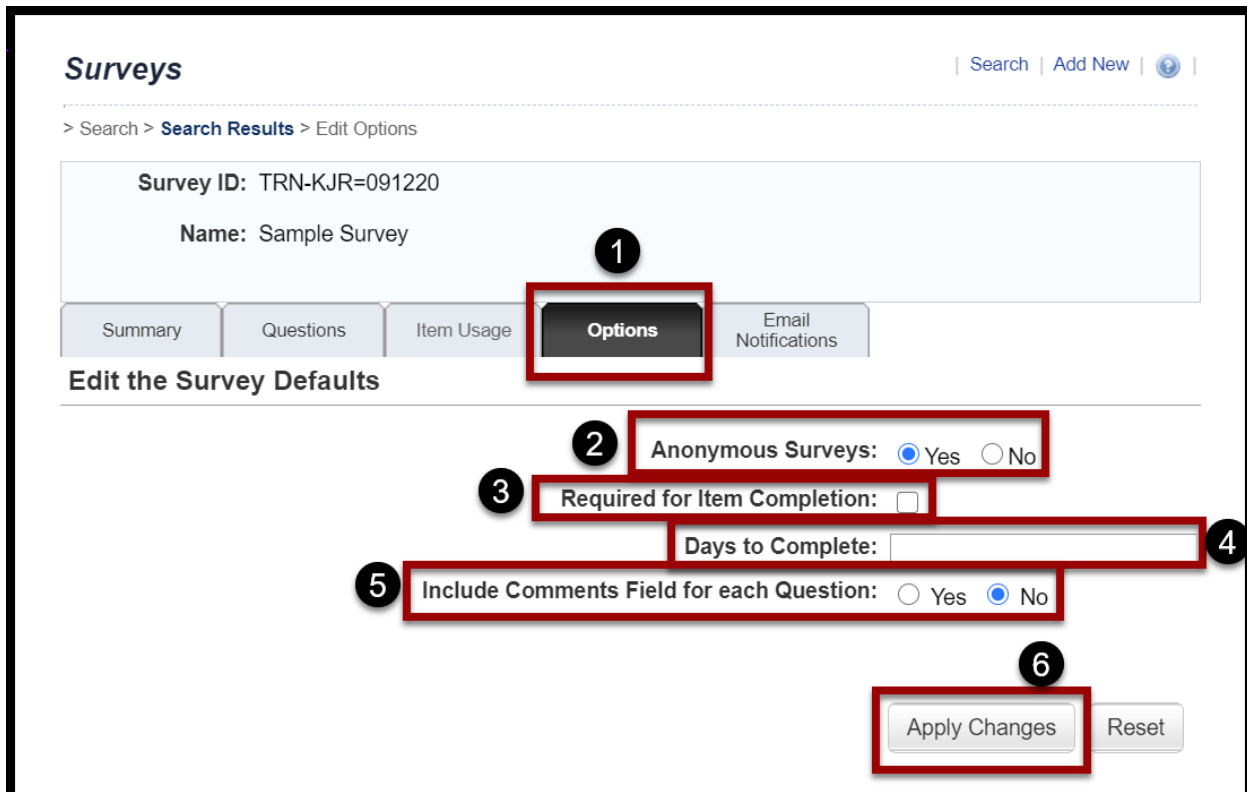
Search Results Table:

Survey ID	Survey Name	Security Domains	Description
TRN-KJR-091220	Sample Survey	OHRA	



Task B. Set Course Feedback Options

1. Select the **Options** tab.
2. Answer whether you would like the survey to be **anonymous** or not. The TMS defaults to anonymous.
3. Select the checkbox if the survey should be **Required for Item Completion**. Keep in mind, if a survey is required, all questions within the survey will require a response. Also, the users will only receive completion credit once the survey is complete.
4. Enter the **Days to Complete** for how long participants have to complete the survey. If the user does not complete the survey within the selected timeframe, the survey will be placed in a past due status.
5. Select the desired radio button for **Include Comments Field for each Question**.
6. Select **Apply Changes**.



Surveys | Search | Add New | ?

> Search > Search Results > Edit Options

Survey ID: TRN-KJR=091220

Name: Sample Survey

Summary | Questions | Item Usage | **Options** | Email Notifications

Edit the Survey Defaults

1. **Options** tab

2. Anonymous Surveys: ☒ Yes ☐ No

3. Required for Item Completion: ☐

4. Days to Complete:

5. Include Comments Field for each Question: ☐ Yes ☒ No

6. **Apply Changes** | Reset



Task C. Configure Email Notification Settings

1. Select the **Notifications** tab.
2. (Optional) Add an attachment to be sent out with your notification by selecting **Choose File** and selecting the file from its saved location.
3. To manipulate the notification message, select the **Launch Editor** link.

Surveys

Search | Add New |

> Search > Search Results > Edit Email Notifications

Survey ID: TRN-KJR-091220

Name: Sample Survey

Summary Questions Item Usage Options **Email Notifications**

Edit Survey Email Notifications

Edit the Survey Email Notification

Use Editor Content When Sending Email Notification: ☐ [Launch Editor](#)

User:

Other:

Body:

Preview Apply Changes Reset

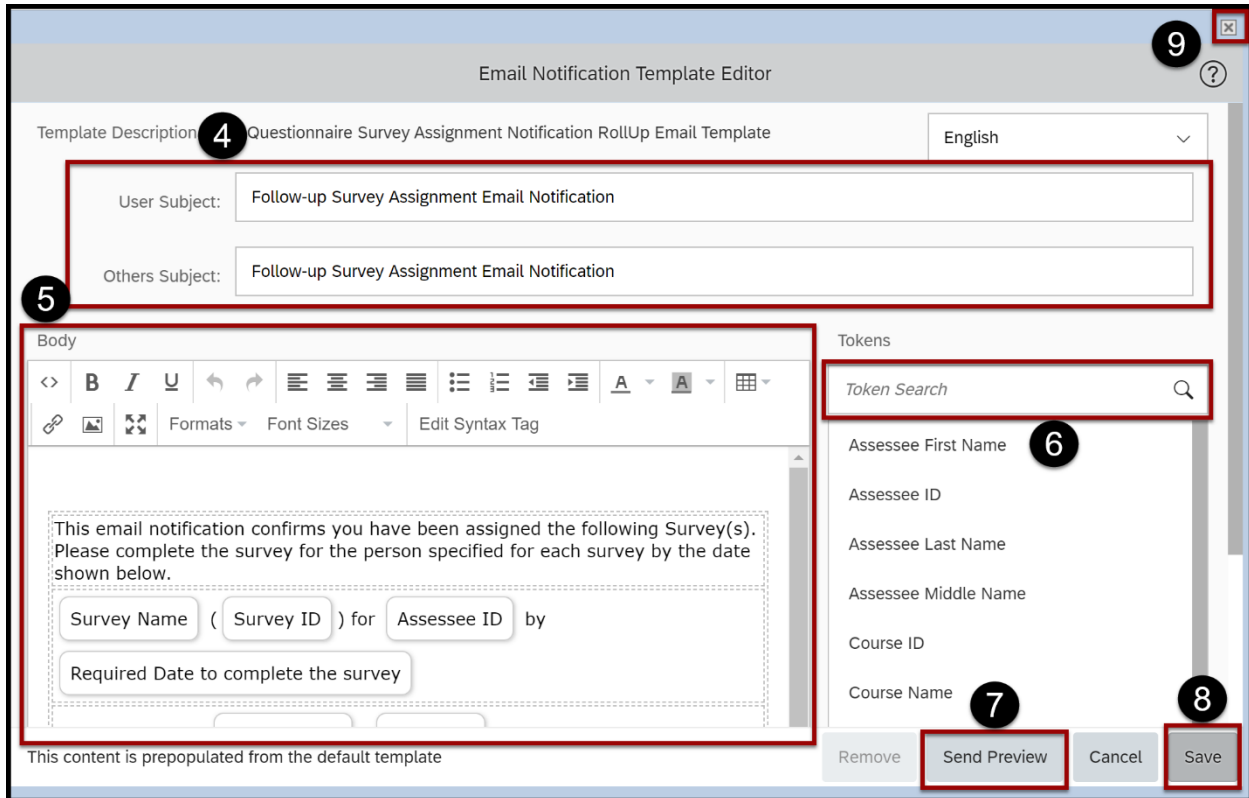
Attachment for Survey Email Notification

Current Attachment: **2**

New Attachment: **Choose File** No file chosen

Apply Changes Reset Clear the Attachment

4. Adjust the **User Subject** and **Others Subject** fields as desired.
5. Adjust the **Body** message.
6. (Optional) Add **Syntax Tags** to your message.
7. (Optional) Choose the **Send Preview** button to preview how your message will be received by users.
8. Select **Save**.
9. **Close** the Notification Template Editor.



The screenshot shows the 'Email Notification Template Editor' window. It includes a title bar with a close button (9) and a help icon (?). The main area is divided into several sections:


- Template Description:** Labeled with a callout 4, it shows 'Questionnaire Survey Assignment Notification RollUp Email Template' and a language dropdown set to 'English'.
- User Subject:** A text field containing 'Follow-up Survey Assignment Email Notification'.
- Others Subject:** A text field containing 'Follow-up Survey Assignment Email Notification'.
- Body:** Labeled with a callout 5, it features a rich text editor with a toolbar (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, text color, background color, table) and a text area containing a sample email message. The message text is: 'This email notification confirms you have been assigned the following Survey(s). Please complete the survey for the person specified for each survey by the date shown below.' followed by a table with columns for 'Survey Name', 'Survey ID', 'Assessee ID', and 'Required Date to complete the survey'.
- Tokens:** A list of available tokens for insertion into the body text, including 'Assessee First Name' (6), 'Assessee ID', 'Assessee Last Name', 'Assessee Middle Name', 'Course ID', and 'Course Name' (7). A search bar is at the top of this list.
- Buttons:** At the bottom right, there are four buttons: 'Remove', 'Send Preview' (7), 'Cancel', and 'Save' (8).

A footer note states: 'This content is prepopulated from the default template'.

10. To send out the notification with your Launch Editor adjustments, select the **Use Editor Content When Sending Email Notification** checkbox.

11. Select **Apply Changes**.

Surveys

[Search](#) | [Add New](#) | 

[> Search](#) > [Search Results](#) > Edit Email Notifications

Survey ID: TRN-KJR-091220

Name: Sample Survey

Summary

Questions

Item Usage

Options

Email Notifications

Edit Survey Email Notifications

Edit the Survey Email Notification

Use Editor Content When Sending Email Notification:

10

☐

[Launch Editor](#)

User:

<label key="notification.FollowupEvaluationAssignmentNotification.StudentSubject"/>

Other:

<label key="notification.FollowupEvaluationAssignmentNotification.OthersSubject"/>

Body:

<html>

<body>

<table>

<tr><td><label key="notification.FollowupEvaluationAssignmentNotification.MessageText1"/></tr></td>

</table>


11

Preview

Apply Changes

Reset

8



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