Lamplight

Evaluations Module
Set-up Guide

Thank you for adding the Evaluations Module to your system. This gives you the ability to create bespoke surveys/feedback forms/questionnaires, then capture and report on the findings.

You'll need to have a System Administrator role to add, edit or remove evaluations. You can see your role in the system directly to the right of your name at the top of the screen.

Go to the System Administration menu by clicking on Admin in the main menu, and then choosing 'System Administration' in the menu bar itself. You'll see a new section in this page called 'Manage Evaluations'. From this section, select the option 'Add, edit and remove evaluation templates.'

Manage Evaluations

Add, edit and remove evaluation templates

If you're familiar with editing profile fields in System Admin, the Add, edit and remove evaluations page will be familiar to you, and works in the same way.

Creating an evaluation

The left-hand column shows you the different evaluations present in the system and gives you a button at the bottom of the column to add a new evaluation ('click to add').

Set up and manage evaluations

Current Evaluations

Training Course	Del
Client case study	Del
click to add	

Click on one of the buttons above to see further details in the central pane.

To add an evaluation, click on the grey 'click to add' button in the left-hand column. This will open a section in the middle column, as shown below.
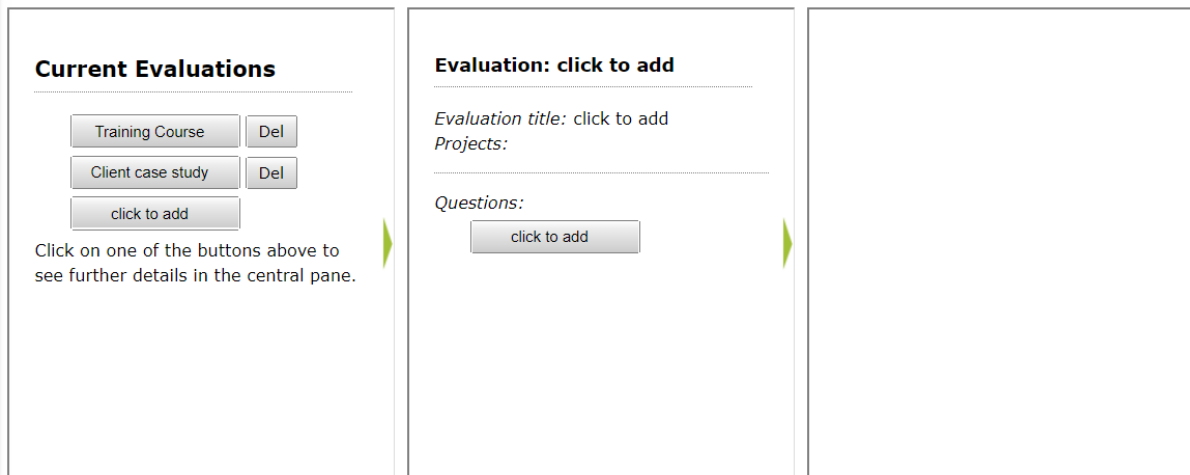
You can edit the name of this evaluation by double clicking on the non-bold text 'Evaluation title: click to add'. Double clicking on this text will open a dialogue box, allowing you to enter the name of the evaluation. If you have multiple Lamplight projects, you can also select which projects will be able to use this evaluation. Click save when done.
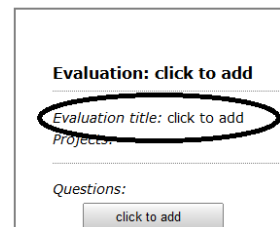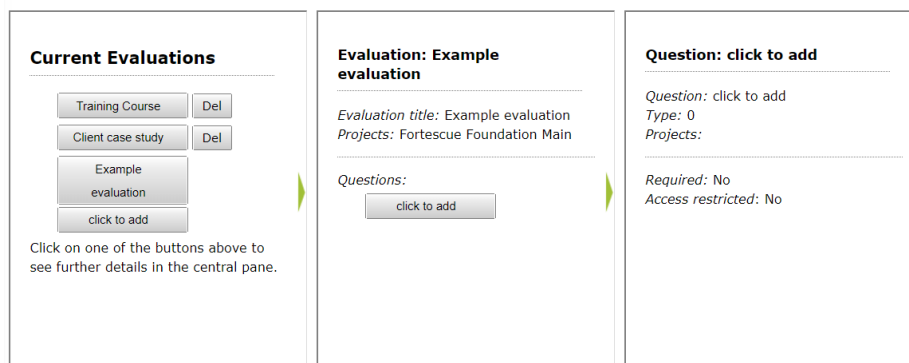

You'll now see your named evaluation showing in the middle column, and a 'click to add' box also in the middle column below it. This button lets you add questions to your evaluation.

It's important when creating a new evaluation to always add at least one question, even if it's a temporary one. If you don't do this, the evaluation will appear in your system, but you'll no longer be able to edit it. If this does happen, please contact Lamplight for support.

Select the 'click to add' button, and you'll see new options appear in the right-hand column, as below.

Double click the non-bold text 'Question: click to add' to open a new dialogue box, allowing you to choose options.

In the box title 'Text', enter the evaluation question you wish to ask. Then, from the 'Type' drop-down box, select the type of field you wish to use. We've detailed the types of field below.

- select box: a drop-down list allowing you to choose a single item
- multi-select box: a drop-down list allowing you to select multiple options
- text box: a single line text entry box
- text area: a larger text-entry area
- date selector: a date field
- checkbox: a single option with a box that can be ticked
- radio button: a single option with a radar button to select it
- date/time selector: like date selector, but allows you to enter a time too
- rich text editor: gives a large text entry box, with full rich text options
- number box: a small box that will only allow you to enter numbers with no spaces (for phone numbers, use a text box if you wish to allow spaces)
- date of birth selector: like the date selector, but automatically displays age when viewing, and allows for additional reporting options
- caption: a large, bold heading within your evaluation
- fixed text box: a normal sized line of text as a guide or sub-heading
- year selector: a year field

- radio buttons: select-one: multiple options listed on the page where you can only select one, and offers a 'none' option
- checkboxes: select-many: multiple options, of which you can select one or more by ticking the checkboxes next to them
- Charity number lookup: a field to enter an English charity number providing a link to an Open Charities lookup
- Twitter name: a text box in which to enter a Twitter name, providing a link to the Twitter profile
- Web address: a space to enter a web address, providing a hyperlink

The final option is 'Is this a required field'. A required field is a mandatory field. Ticking this box means that the evaluation form won't save until an answer has been given to this question at the point of data entry.

Once you have selected your options, choose 'save'.

If you have selected one of the question types for which you can enter options, you'll now see a small square text box at the bottom of the right-hand column.

Enter the options you want in your field here, each one separated a semi-colon. Don't enter any spaces on either side of the semi-colon.

Once you've done this, as in the picture, choose the 'Add' button, and you will see the options added to the field.

Adding another field

To add another field, follow the same process as above, selecting the 'click to add' button in the middle column.

Creating another evaluation

You can have as many as evaluations as you require. For each new evaluation simply follow the process from the very start.

Once you have created an evaluation, try completing it as a test client to ensure everything is as you expect. It will appear and be accessible from the main menu record section.

Editing and deleting evaluations

Important: Before you edit or delete an evaluation, consider the effect this may have on your existing data.

If you remove an evaluation, all evaluations of that type already entered will remain in the system and can be seen by going to Activity > View > Evaluations, or alternatively viewing them in the 'evaluations' tab of a person's profile. However, you'll no longer be able to report on them or filter based on them, as you will not have the option to select that evaluation type. This is also true of evaluation fields. If you delete an evaluation question or option, it will no longer be possible to choose to filter on this option or question when you run reports. However, it will still be possible to go to an individual's profile to see the full set of answers they gave (unless it was anonymous survey).

Changing the names of fields can also have interesting results. For example, if you change the name of the option 'Science' to 'History', then when you run a report all the people who had previously selected 'Science' as their answer, will now be showing as having selected 'History'.

When you've considered the above warning about editing and deleting:

Edit or delete a complete evaluation

To edit or delete an evaluation you follow essentially the same process as for adding a new evaluation (it is the same section within the system administration menu). Select the evaluation you wish to edit in the left column.

To change the evaluation name, in the middle column double click the non-bold text 'Evaluation title'. This will open the dialogue box and let you change the name of the evaluation. Use the 'Enter' key to save.

Edit or Delete a Field or Question

To edit a field or question, click on the appropriate evaluation and in the middle column select the field/question you wish to edit. Now in the right-hand column double click the non-bold text 'Question'. This will open a dialogue box to allow you to change the field name and type. Be careful, as you can lose existing data held in a field by changing the type of field it is. For example, if you change a 'Text box' to a 'Select box' you no longer be able to see the answers that people have previously given to that question. However, Lamplight is still storing the information, and if you change the field back to its original type (in this case 'Text box') then you will be able to see it again. **If you are uncertain about this, please do speak with us.**

To edit an option in the right-hand column, simply double click the text of the option in its grey box. This will open a dialogue box to let you change the wording of the option.

You can also use the 'Del' button next to any field or option to allow you to delete it.

Finally, if you have finished reporting on a set of evaluations and wish to delete them, we would encourage you to delete all the fields in the evaluation followed by the evaluation itself.