



**Creating Wizard Questions
And
Predefined Comments**

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Wizard Questions

The basic premise of an assessment is a series of well thought out questions. Simple questions can be created using basic “Yes/No” and ranking scores. Depending on how the question is asked, either 0 or 5 corresponds to an answer of “No” or “Yes”. The reverse can be true, depending how the question is worded.

Answering a ranking question simply provides a range selection, from 0 to 5. To provide more detailed questions and a wider range of scoring capabilities, there are Multi Select and Option Type questions.

Wizard questions can only be created/updated in a library. The assessment generation process will make use of the wizard questions, if they exist.

Option type or multi select questions can be added to library issues in 2 ways;

1. Directly, as part of the issue question.
2. Indirectly, as a wizard question.

These question types can be created for each and every library issue, if all the questions are very different from one another. If there are questions that will be used repeatedly, then they can be created as a “wizard question” and applied to many library issues at one time. One feature of using wizard questions is that any changes made to the questions can be applied to the library issues that make use of the wizard question.

Multi Select questions can make use of up to 10 individual, logically grouped questions, each with a score from 1 to 5. During the assessment process, users should select all answers that are true. Option questions can make use of up to 5 individual questions. These questions are mutually exclusive and so users can select only 1 answer for the question.

Revalyst supports 2 library types. They are weighted and non-weighted (points based). The non-weighted library simply makes use of questions with an assigned maximum score. A non-weighted assessment is simply the sum of all assessment question scores.

The following images illustrate how a simple option question and multi select question (respectively) would appear in a weighted assessment, where the scores range from 0 to 5, and the score is calculated based on the user's selection or selections.

The image displays two screenshots of a software interface for configuring assessment questions. The top screenshot shows an 'Option Type' question configuration, and the bottom screenshot shows a 'Multi Select' question configuration. Both screenshots include a navigation bar with 'Assessment Information', 'Supporting Information', and 'Detailed Information' tabs.

Option Type Configuration:

- Item:** Is backup log monitored with paper log accessible?
- Short Name:** Backup Monitoring
- Last Revised By:** [Dropdown]
- Group:** Disaster Recovery
- Sub Group:** Office
- Include In Assessment:** Yes No
- Priority:** [Dropdown]
- Rec. Evaluation Method:** Combination
- Actual Evaluation Method:** [Dropdown]
- Rec. Person To Interview:** It Manager
- Primary Person Interviewed:** [Dropdown]
- Guideline Requirements:** Not Available
- Type of Measure:** [Dropdown]
- Measured Result:** [Text Field]
- Buttons:** View Issues, View Process/Methods
- Scoring Details:** No log or ambiguous recording, Basic log sheet with no sign off and incomplete records, Detailed multi-column log sheet with management sign off.
- Adequately Assessed:** Yes
- Comments:** [Text Area]

Multi Select Configuration:

- Guideline Requirements:** Not Available
- Type of Measure:** [Dropdown]
- Measured Result:** [Text Field]
- Buttons:** View Issues, View Process/Methods
- Scoring Details:**

Has the restore capability been properly documented and available in hard copy?	<input checked="" type="checkbox"/> Yes
Have you tested the restore process to confirm that backups are working recently?	<input type="checkbox"/> Yes
Is there a paper log to log backups and restore efforts, tests and results?	<input checked="" type="checkbox"/> Yes
Is this log checked by a senior technical resource to ensure it is being done?	<input type="checkbox"/> Yes
- Adequately Assessed:** Yes
- Comments:** [Text Area]

The following image illustrates how a multi select question would appear in a non-weighted assessment, where the scores can be any value, and the total score is calculated by accumulating the individual scores associated with the user’s selection or selections. The possible score is shown and the user can set the actual score using the “combo boxes” in the “Actual” column, which provide a range of 0 to the possible score for each individual question.

Please note that the option question works the same way, irrespective of library type.

Assessment Information |
 Supporting Information |
 Detailed Information

Item : 4. Signed and dated by the responsible director.

Short Name :

Last Revised By :

Group : Occupational Health and Safety Policy **Sub Group :** Key Element

Include In Assessment : Yes No **Priority :**

Rec. Evaluation Method : Not Assigned **Actual Evaluation Method :**

Rec. Person To Interview : Anyone **Primary Person Interviewed :**

Guideline Requirements : Not Available

Type of Measure : **Measured Result :**

Scoring Details

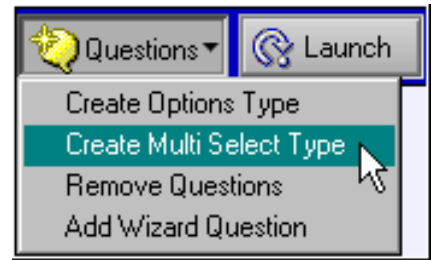
	Possible	Actual
Is the policy so signed and dated?	1	1 <input type="text"/>
Are the practical organisational implications of the policy apparently understood by the director and employee representatives?	3	3 <input type="text"/>
Does the responsible director appear to be intent to implement the policy?	3	3 <input type="text"/>
Total	7	

Adequately Assessed : Yes

Comments :

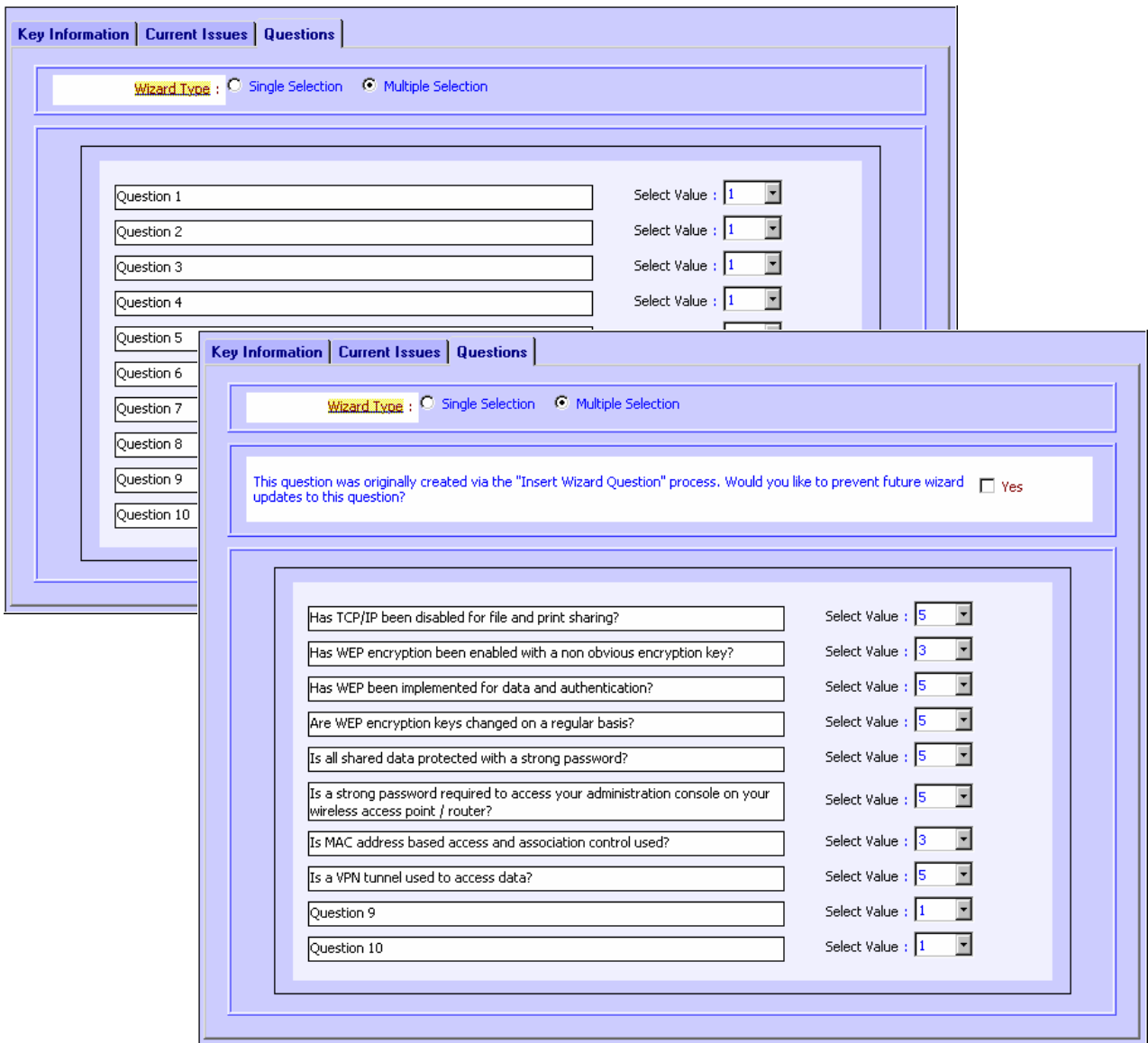
Adding Wizard Questions Directly Into An Issue

Select “Issues” on the navigator and open any library issue that has been created. From the issue’s main menu select “Questions”. The drop down menu contains 4 options. Select either “Create Options Type” or “Create Multi Select Type”.



Note : To remove these types questions from a library issue, you must open the issue and use “Remove Questions”.

If “Create Multi-Select Type” was selected in a weighted library, a “Questions” tab will appear in the issue. Select the “Questions” tab and the following screen will appear. Simply provide question details and associated scoring.



If “Create Multi-Select Type” was selected for a non weighted library, a “Questions” tab will appear in the issue. Select the “Questions” tab and the following screen will appear for a weighted library. Simply provide question details and associated scoring. The difference between using a weighted library and a non-weighted library is that the questions for a non-weighted library can be assigned any value, whereas the weighted library uses a value between 0 and 5.

Question	Enter Value
Is the policy available in appropriate languages?	2
Is the policy given and explained to new employees?	1
Is the policy displayed on notice boards or publicised in some similar way?	1
Does the policy appear to be known and understood by employees and accepted by them?	3
Question 5	1
Question 6	1
Question 7	1
Question 8	1
Question 9	1
Question 10	1

If “Create Options Type” was selected, a “Questions” tab will appear in the issue. Select the “Questions” tab and the following screen will appear. Simply provide question details and associated scoring, remembering that only a single selection can be made by the user.

The screenshot shows a software interface with a tabbed menu at the top containing 'Key Information', 'Current Issues', and 'Questions'. The 'Questions' tab is active. A red note at the top of the form reads: ***(All questions can be no longer than 60 characters)**. The form contains several rows, each with a text input field and a 'Select Value' dropdown menu. The visible rows are:

- Question 1: Select Value : 1
- Question 2: Select Value : 2
- Question 3: Select Value : 3
- Question 4: Select Value : 4

Below this main form, there is a section titled 'Sample Question Set' which contains a list of questions with radio buttons and associated values:

Questions	Value
<input type="radio"/> Major Risk	1
<input type="radio"/> Major Concerns	2
<input type="radio"/> Significant Concerns	3
<input type="radio"/> Moderate Concerns	4
<input type="radio"/> Very Good	5

Creating Wizard Questions

Select “Wizard Questions” the main menu or the navigator. From either location you can create an Option or Multi Select question.

If you create the option question the following screen will appear. You can add up to 6 questions, equating to values of 0 to 5. The example below uses only 5 questions, with scoring from 1 to 5.

In fact this example is really using 5 statements, instead of 5 questions. How the content is used is totally up to the author of the library.

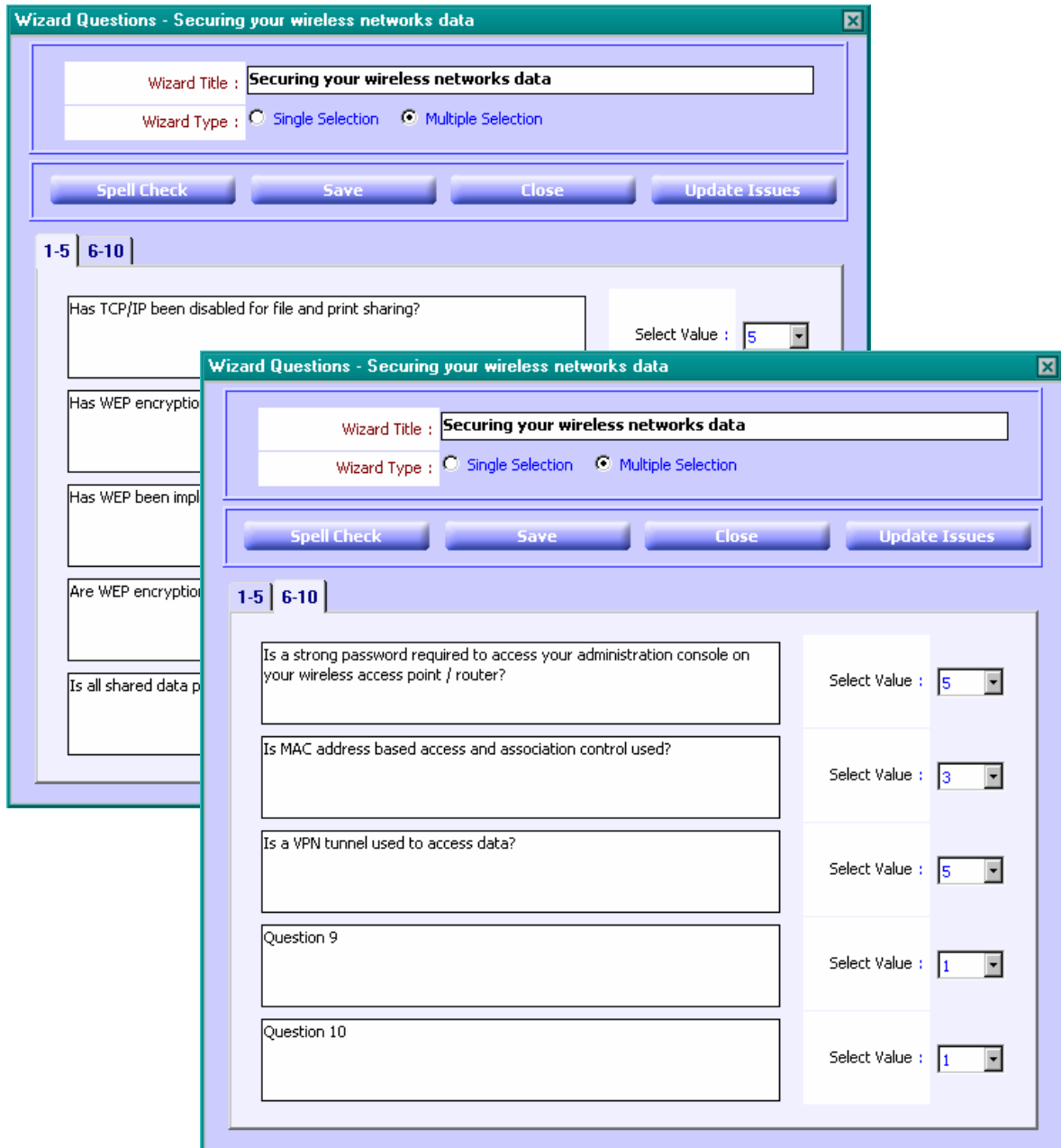
Wizard Questions - Ranking - Risk

Wizard Title :

*(All questions can be no longer than 60 characters)

<input type="text" value="Major Risk"/>	Select Value : <input type="text" value="1"/>
<input type="text" value="Major Concerns"/>	Select Value : <input type="text" value="2"/>
<input type="text" value="Significant Concerns"/>	Select Value : <input type="text" value="3"/>
<input type="text" value="Moderate Concerns"/>	Select Value : <input type="text" value="4"/>
<input type="text" value="Very Good"/>	Select Value : <input type="text" value="5"/>
<input type="text" value="Question 6"/>	Select Value : <input type="text" value="0"/>

If you create a multi select question for a weighted library, the following screen will appear. You can add up to 10 questions, equating to values from 1 to 5 for each and every question. Regardless of the number of questions and point allocation, the overall score is calculated out of 5. The multi select questions can operate in 2 modes. They are Single Selection and Multiple Selection (explained on page 7)

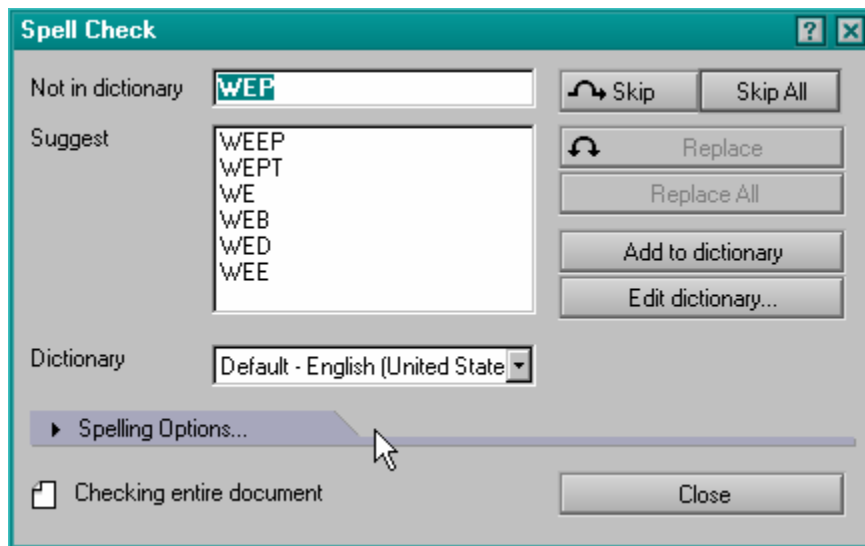


Note : When using a non-weighted library, the scores are entered as numeric values and not selected from a “combo box”.

The Single Selection option, when selected implies that, even though there may be 10 related questions, users can only make a single selection.

Note : The Single Selection works exactly like the option type question, except that the option type question is limited to 60 characters per question. The multi select questions support large quantities of text (if required).

Questions can be spell checked at anytime.



Note : If there are library issues, that use the wizard question that you have modified, you can use the “Update Issues” button so that the issues reflect the changes.

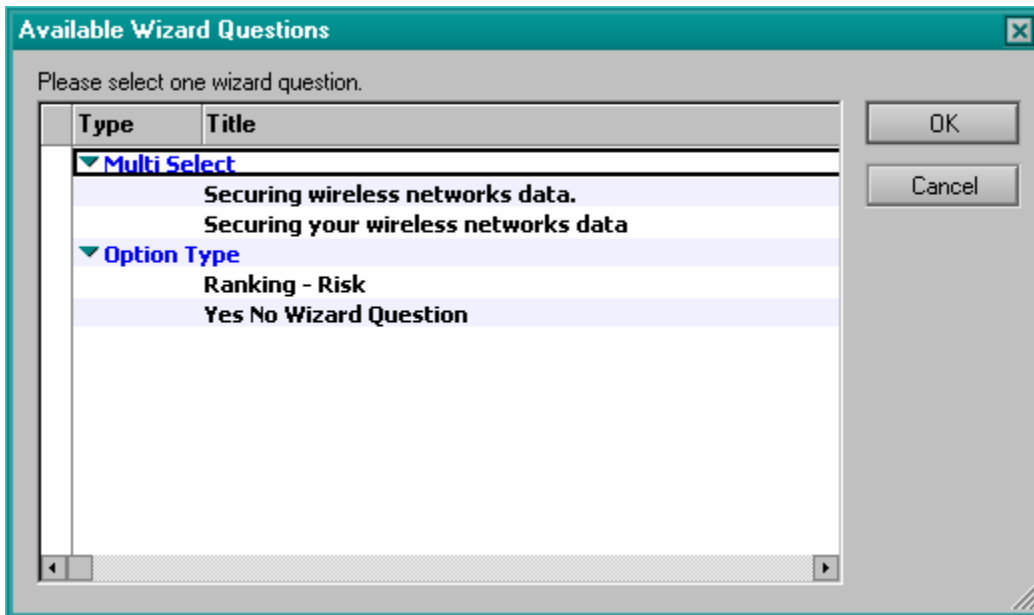


Adding Wizard Questions to Library Issues

From the Issues view, simply select one or more issues that you would like a wizard question associated with. Select the “Add/Wizard Question” option.



The following form will appear. Make a selection and the question will be included as part of the issue for use in an assessment.



Open the issue and the questions tab will appear, with the question details available for viewing.

Option Type question tab.

The screenshot shows a web interface with three tabs: 'Key Information', 'Current Issues', and 'Questions'. The 'Questions' tab is active. At the top, a red note states: **(All questions can be no longer than 60 characters)*. Below this, there are six text input fields, each followed by a 'Select Value' dropdown menu. The options and their values are:

Major Risk	Select Value : 1
Major Concerns	Select Value : 2
Significant Concerns	Select Value : 3
Moderate Concerns	Select Value : 4
Very Good	Select Value : 5
Question 6	Select Value : 0

Below this section is a 'Sample Question Set' box containing a list of radio button options:

- Major Risk 1
- Major Concerns 2
- Significant Concerns 3
- Moderate Concerns 4
- Very Good 5

Multi-Select question tab.

The screenshot shows a web interface with three tabs: 'Key Information', 'Current Issues', and 'Questions'. The 'Questions' tab is active. At the top, there is a 'Wizard Type' section with two radio buttons: 'Single Selection' and 'Multiple Selection'. Below this is a message box: 'This question was originally created via the "Insert Wizard Question" process. Would you like to prevent future wizard updates to this question?' with a 'Yes' checkbox. The main content area contains a list of text input fields, each followed by a 'Select Value' dropdown menu. The questions and their values are:

Has TCP/IP been disabled for file and print sharing?	Select Value : 5
Has WEP encryption been enabled with a non obvious encryption key?	Select Value : 3
Has WEP been implemented for data and authentication?	Select Value : 5
Are WEP encryption keys changed on a regular basis?	Select Value : 5
Is all shared data protected with a strong password?	Select Value : 5
Is a strong password required to access your administration console on your wireless access point / router?	Select Value : 5
Is MAC address based access and association control used?	Select Value : 3
Is a VPN tunnel used to access data?	Select Value : 5
Question 9	Select Value : 1
Question 10	Select Value : 1

To see which issues make use of wizard questions, use the “View By/Wizard Questions” option (which is part of the “View Key Elements/Issues” option on the navigator).

Index	Category	Short Name	Issue	Time (Est)
1	Corporate			264
1.1				6
1.1.1				4
1.1.1.1		OS Consistency	Are all operating systems consistent throughout your organization?	
1.1.1.2		Hardware Consistency	Is the hardware consistent throughout organization?	
1.1.2				2
1.1.2.1		Hardware Upgrades	Are hardware upgrades applied to all machines and documented?	
1.2	Consistency Issues			8
1.2.1	Documentation			2
1.2.1.1		Documented Standard Installs	Is there documentation for standard installs on all equipment?	
1.2.2	Service Packs			2
1.2.2.1		Service Packs	Are service packs applied to all machines and documented?	
1.2.3	Standards			2
1.2.3.1		Printer Consistency	Are printers throughout organization consistent?	

The following view will appear, with issues categorized by the type of wizard question they reference. Double click on an issue and you will see the question as part of the issue.

Question Type	For	Issue
Multi Select		
	Corporate>>Consistency Issues>Templates	Is there a standard location for all repeatable correspondence forms/documents/spreadsheets?
	Corporate>>Custom Software>Developer	Has the strength of software firm been investigated to confirm probability of survival?
	Corporate>>Disaster Recovery>Office	Is there a disaster recovery plan in place and documented? Is there an alternate backup person(s) for backup support? Are periodic recovery tests being performed with paper log known and accessible?
	Corporate>>IT Asset Management>Software Licensing	Is there a clearly stated, published and well disseminated zero tolerance policy against software piracy/infringement?
	Corporate>>Security & Access>Sensitive Information	
	Corporate>>Security & Access>Work in Progress	
	Corporate>>Web Site>Web Site Analysis	
	Corporate>>Web Site>Web Site Management	
	Laptop>>Security & Access>Theft & Access	
	Server>>Opportunity>Performance	
	Workstation>>Employee (Survey)>Equipment	
	Workstation>>Employee (Survey)>Productivity	
	Workstation>>Environmental>Power	
	Workstation>>Ergonomics>Working Conditions	
	Workstation>>Security & Access>Theft & Access	
Option Type		
	Corporate>>Compatibility>Standards	
	Corporate>>Disaster Recovery>Office	
	Corporate>>Email>Spam	
	Corporate>>IT Management>Outsource and Vendor Relationships	
	Workstation>>Email>Etiquette	
	Workstation>>Employee (Survey)>Productivity	
	Workstation>>Employee (Survey)>Reliability	

Usage In An Assessment

Multi-Select and Option questions as viewed in an assessment (partial screens)

Item :	Is there a disaster recovery plan in place and documented?		
Short Name :	Disaster Planning		
Last Revised By :	[Dropdown]		
Group :	Disaster Recovery	Sub Group :	Office
Include In Assessment :	<input checked="" type="radio"/> Yes <input type="radio"/> No		Priority : [Dropdown]
Rec. Evaluation Method :	Interview	Actual Evaluation Method :	[Dropdown]
Rec. Person To Interview :	Owner	Primary Person Interviewed :	[Dropdown]
Guideline Requirements :	Not Available		
Type of Measure :	[Dropdown]	Measured Result :	[Text]
View Issues		View Process/Methods	
Scoring Details			
Does your company backup all mission critical data at least daily?			<input checked="" type="checkbox"/> Yes
Are company backups sent within 24 hours to a safe, off-site archive?			<input type="checkbox"/> Yes
Does your company have a common policy for backup and recovery procedures that includes remote company locations?			<input checked="" type="checkbox"/> Yes
Have you used a business impact analysis (BIA) to quantify and rank the financial risk of outages to all vital functions?			<input type="checkbox"/> Yes
Does your company have a written disaster recovery plan that includes data backup and archive procedures?			<input checked="" type="checkbox"/> Yes
Has your company tested your disaster recovery plan using a worst-case scenario, such as loss of an entire facility?			<input type="checkbox"/> Yes
Did tests of your disaster recovery plan prove that you could recover critical business functions within recovery time objectives?			<input checked="" type="checkbox"/> Yes
Is your disaster recovery plan updated regularly to keep it current with business and staffing changes?			<input type="checkbox"/> Yes
A H C			<input checked="" type="checkbox"/> Yes

Item :	Is backup log monitored with paper log accessible?		
Short Name :	Backup Monitoring		
Last Revised By :	[Dropdown]		
Group :	Disaster Recovery	Sub Group :	Office
Include In Assessment :	<input checked="" type="radio"/> Yes <input type="radio"/> No		Priority : [Dropdown]
Rec. Evaluation Method :	Combination	Actual Evaluation Method :	[Dropdown]
Rec. Person To Interview :	IT Manager	Primary Person Interviewed :	[Dropdown]
Guideline Requirements :	Not Available		
Type of Measure :	[Dropdown]	Measured Result :	[Text]
View Issues		View Process/Methods	
Scoring Details			
<input type="radio"/> No log or ambiguous recording. <input type="radio"/> Basic log sheet with no sign off and incomplete records. <input type="radio"/> Detailed multi-column log sheet with management sign off.			
Adequately Assessed :	<input type="checkbox"/> Yes		
Comments :	[Text Area]		

Report Sample

Multi-Select and Option questions as they appear in reports (excerpt only)

Productivity		
BBurge		
Are you distracted by noise, equipment, other workers?	Not Scored	5
Question		Points for Meeting Criteria
Noise level from my workstation and peripherals is acceptable.		
Speaker noise from other workstations is acceptable.		
Paper shredder noise from other workstations is acceptable.		
Conversational noise from other workstations is acceptable.		
Walk by traffic noise is acceptable.		
Noise from common areas is acceptable.		
	Total Points :	0 / 0
Could your input productivity(typing speed) be increased through practice or alternative techniques or devices?	Not Scored	5
Question		
My typing is above 100 words per minute. (5)		
My typing is above 80 words per minute. (4)		
My typing is above 60 words per minute. (3)		
My typing is above 40 words per minute. (2)		

Pre-defined Comments

Pre-defined comments are a means of ensuring that anyone conducting an assessment uses a series of well thought out and applicable comments, based on the score of the assessment issue. This ensures consistency between assessments, with no need to analyze assessor comments, which can vary depending on one’s interpretation of the assessment question.

We have created a “Travel Agents” library, with simple questions, as the basis of the pre-defined comment examples. To quickly view any pre-defined comments, select “Pre-defined Comments” from the navigator. If they exist, they will appear grouped by the issue for which they were created and then by the individual scores they are associated with (as shown below).

The screenshot shows the Analyst for software interface. The main window title is "Travel Agents Library - (Pre-Defi...". The interface includes a menu bar with options like "Goto", "View", "Create", "Content", "Content Management", "Terminology", "Wizard Questions", "Reports", "Library Resolutions", and "Help". A sidebar on the left contains a tree view with categories like "View Key Elements", "View Issues By", "View Related", and "Content Management". The "Pre-defined Comments" option is highlighted in red. The main content area displays a table with columns for "Association" and "Comments". The data is grouped by issue: "Travel Agent > Communication Skills > Over the Phone". Each group is further divided by score, from 0 to 5, with corresponding pre-defined comment text.

Association	Comments
Travel Agent > Communication Skills > Over the Phone	
For a score of 0	There were no skills to talk about. There were some skills, but required polish.
For a score of 1	Skills were okay, but talked too much. Skills were okay, but came across as shy.
For a score of 2	Skills were reasonable, but talked too much. Skills were reasonable, but came across as too shy.
For a score of 3	Skills were acceptable, but could be more helpful. Skills were acceptable, but was too helpful.
For a score of 4	Enjoyed talking with this person. Really enjoyed talking with this person.
For a score of 5	Had a blast dealing with this person. Phone calls were very informative. Phone calls left me feeling good about arrangements.

Creating Pre-defined Comments

To add new pre-defined comments you must be in the “Issues” view. Select “Issues” on the navigator. You must select an issue before creating the comments. If a categorized entry is selected, an error message will appear. Use the “Create/Pre-defined Comments” button.

Group	Sub Group	Short Name	Issue	Time (Est)
1	▼ Travel Agent			0
1.1	▼ Communication Skills			0
1.1.1	▼ One on One			0
1.1.1.1		Yes/No Question	Makes you feel comfortable?	
1.1.2	▼ Over the Phone			0
1.1.2.1		Ranking Question	Has good phone skills?	
1.2	▼ Destinations			0
1.2.1	▼ Knowledge			0
1.2.1.1		Option Question	Has a thorough knowledge of domestic locations?	
1.2.1.2		Yes/No Question	Has a thorough knowledge of foreign locations?	
1.2.1.3		Multi-Option Single Select	Would you recommend this agent to your family and friends?	
1.3	▼ Plan Execution			0
1.3.1	▼ At Foreign Location			0
1.3.1.1		Multi-Select Question	Were all aspects of your trip taken care of?	
1.3.2	▼ Locally			0
1.3.2.1		Yes/No Question	Were all aspects of your trip taken care of?	
				0

The following screen will appear, with the key fields already populated. They can be changed if required.

Pre-Defined Comments

Category : Travel Agent

Group : Communication Skills

Sub Group : Over the Phone

Scoring Value : 0 1 2 3 4 5

Spell Check Save & Close Close

1 to 5 | 6 to 10

*(All comments can be no longer than 100 characters)

Comment 1 :

Comment 2 :

Comment 3 :

Comment 4 :

Comment 5 :

Select a “Scoring Value”. In this case we are using 0. Provide up to 10 pre-defined comments for a single score. Use the Spell Check option if necessary. Press the Save & Close button.

Pre-Defined Comments

Category : Travel Agent

Group : Communication Skills

Sub Group : Over the Phone

Scoring Value : 0 1 2 3 4 5

Spell Check Save & Close Close

1 to 5 6 to 10

*All comments can be no longer than 100 characters)

Comment 1 : There were no skills to talk about

Comment 2 : There were some skills, but require polish

Comment 3 : Comment 3

Comment 4 : Comment 4

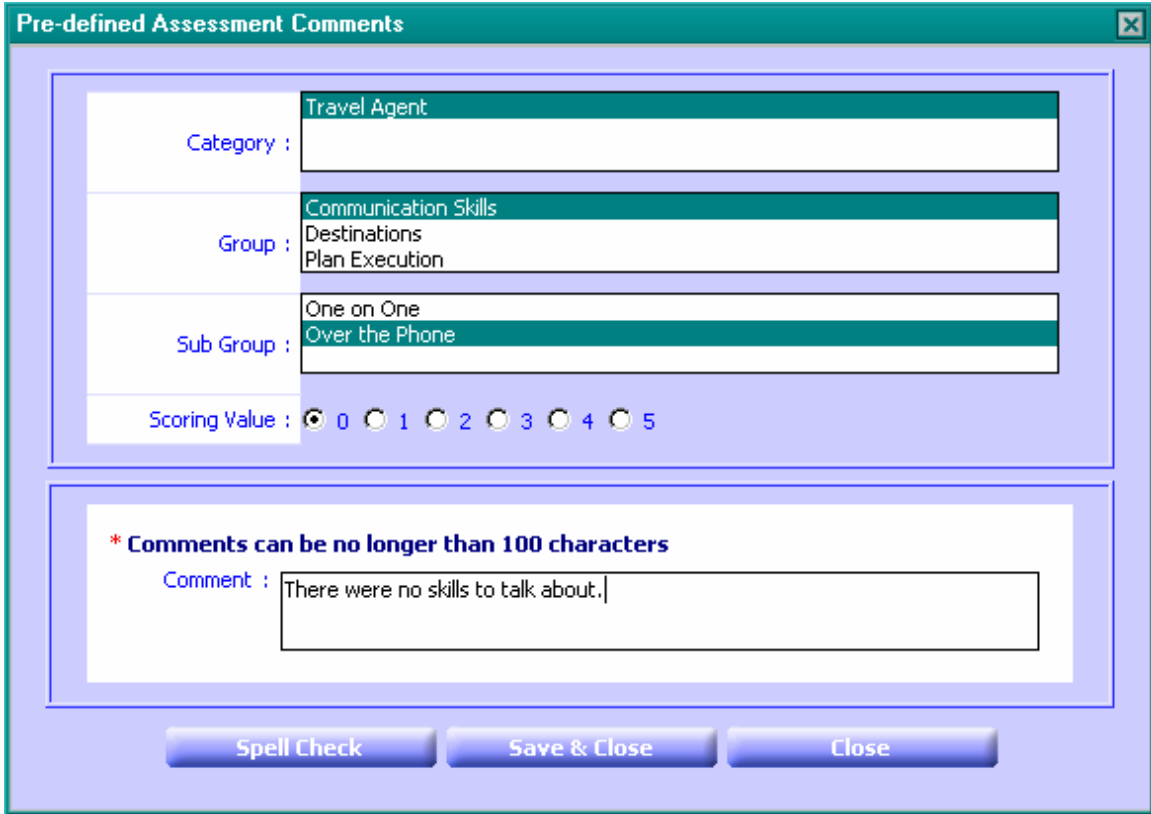
Comment 5 : Comment 5

Follow the same procedure for all scoring values that require pre-defined comments. The entries are saved as individual documents as shown below.

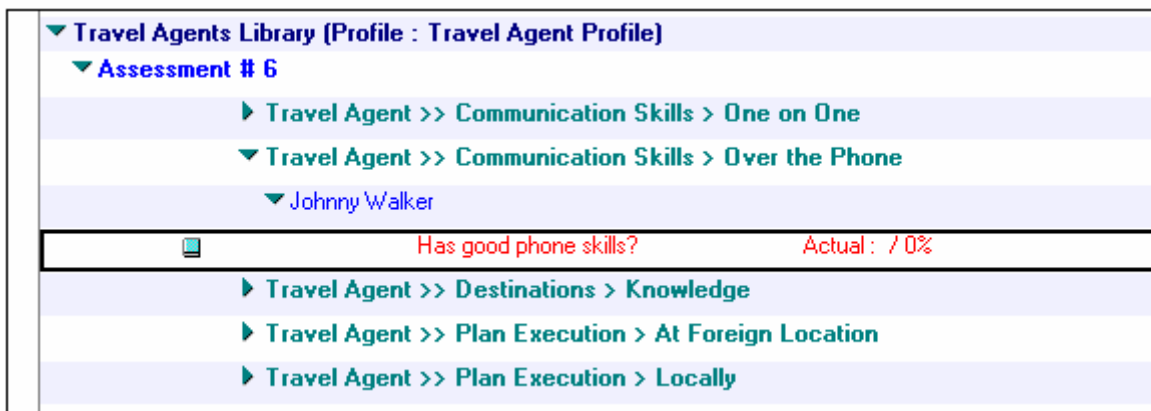
Association	Comments
▼ Travel Agent > Communication Skills > Over the Phone	
▼ For a score of 0	
	There were no skills to talk about.
	There were some skills, but required polish.
▼ For a score of 1	
	Skills were okay, but talked too much.
	Skills were okay, but came across as shy.
▼ For a score of 2	
	Skills were reasonable, but talked too much.
	Skills were reasonable, but came across as too shy.
▼ For a score of 3	
	Skills were acceptable, but could be more helpful.
	Skills were acceptable, but was too helpful.
▼ For a score of 4	
	Enjoyed talking with this person.
	Really enjoyed talking with this person.
▼ For a score of 5	
	Had a blast dealing with this person.
	Phone calls were very informative.
	Phone calls left me feeling good about arrangements.

Editing Pre-defined Comments

To edit a scoring description, simply select a document (from the view) and double click your mouse. The following screen will appear.



The following view comes from an assessment, generated, using the Travel Agents library.



Usage In An Assessment

Open the assessment issue by double-clicking your mouse. The following two screens are excerpts from the issue form.

Setting the “Assessment Score” to 0 will present the two comments previously added in the library. Select one of the two pre-defined comments.

The screenshot shows a form with a yellow header bar. On the left, it says "Assessment Score :". To its right are radio buttons for scores 0, 1, 2, 3, 4, and 5. The radio button for 0 is selected. To the right of the radio buttons is a legend: "0 = No/Poor/Disagree/Negative" and "5 = Yes/Good/Agree/Positive". Below the legend is a yellow bar with the word "Comment" in blue. Underneath is a scrollable list box containing two pre-defined comments: "There were no skills to talk about." and "There were some skills, but required polish." Below the list box is a yellow bar with the text "Comments :". To the right of this bar is a large empty white text area.

Change the “Assessment Score” (in this case “1”) and a new set of pre-defined comments will appear (if they exist).

The screenshot shows the same form as above, but the radio button for score 1 is now selected. The legend remains the same. The scrollable list box now contains two different pre-defined comments: "Skills were okay, but talked too much." and "Skills were okay, but came across as shy." The "Comments :" bar and the empty text area below it are also present.

There may or may not be pre-defined questions for each possible score and the number of pre-defined comments for each score can vary from 2 to 10 questions.

Report Sample

The results of scored issues, containing pre-defined comments and assessor comments, can be viewed in any one of a number of available reports, as shown below.

Revelation For - Assessment Items (Full Detail)			
Printed On : Thursday, July 8, 2004 10:49:05AM	Assessment	Potential Score	Actual Score
Travel Agent			
Communication Skills			
One on One			
Johnny Walker			
Makes you feel comfortable?		5	0
Comments : Not very friendly.			
Over the Phone			
Johnny Walker			
Has good phone skills?		5	1
Predefined Comments Skills were okay, but talked too much.			
Destinations			
Knowledge			
Johnny Walker			
Has a thorough knowledge of domestic locations?		5	4
Comments : Was honest about knowledge			
Question			
Has a thorough knowledge. (5)			
Has a reasonable knowledge. (4)			
Has very little knowledge. (3)			
Has no knowledge. (4)			
Has a thorough knowledge of foreign locations?		5	0
Comments : If he didn't, he would find out and call us back. Great Stuff			
Would you recommend this agent to your family and friends?		5	1

Note : Pre-defined comments are used in the mobile version of Revalyst in exactly the same fashion.