

E>nable Audit

How to Build an Audit

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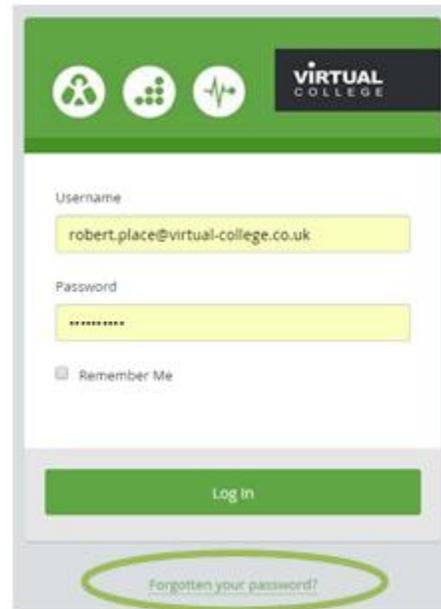
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Getting started

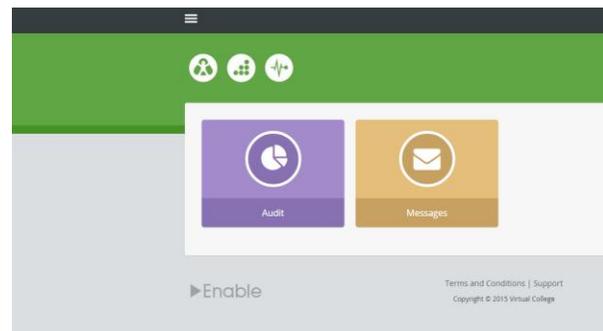
You will have already had your log in details emailed to you when you were set up on the system.

If you have forgotten your password please use the 'forgotten your password?' link at the bottom of the welcome page.



Welcome to your Audit Dashboard

You are automatically taken to the 'dashboard' which will allow you to complete any audits you have to do.



To start building our audit we need to switch our view from 'User' to 'Admin' (an administrator)

This is done by selecting this symbol in the top left hand corner of the screen.

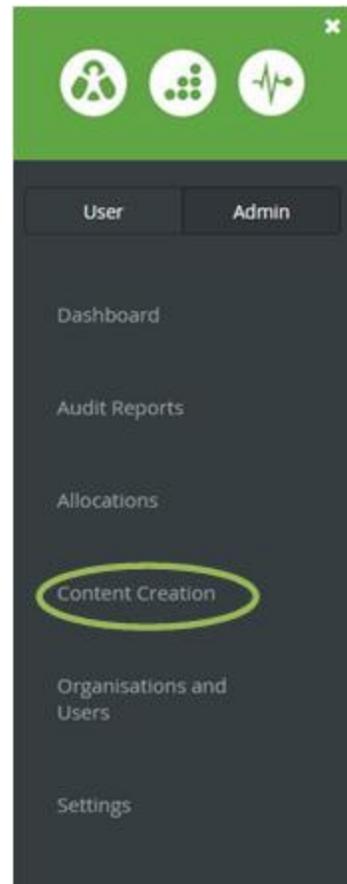


Once you have selected the menu icon you will see this side menu.

Here you can navigate yourself around the whole audit system.

To start creating an audit, please select the 'admin' tab and select 'Dashboard' to go to the administration page.

Here you can select 'Content Creation'.



You also have the option of 'dashboard' which will show the various administration options laid out in a tile format:

Here you will be given various options, all relating to administration elements of the Audit System.

Please select the 'Create Content' icon, highlighted in the picture.

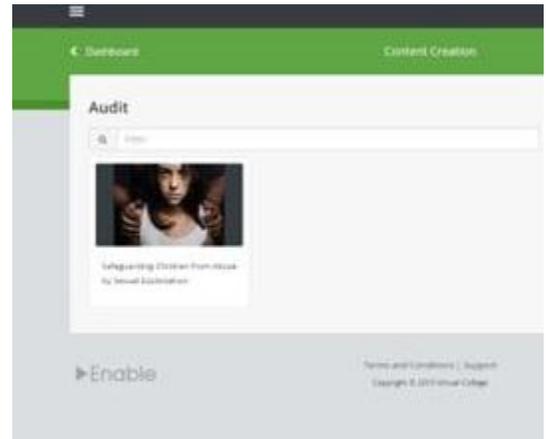
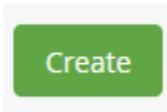


Audit Repository

Here you will be able to see the various audits you have built.

All your audits will remain here for you to access for reflection or updating.

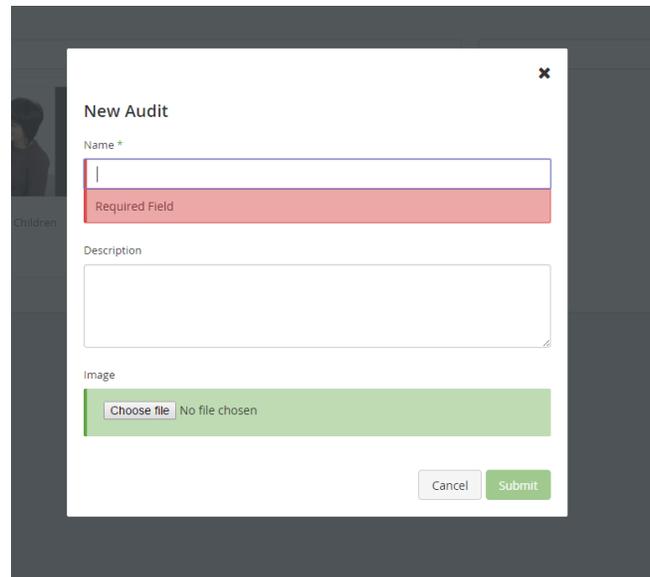
To get started please select the 'Create' icon in the left corner of the screen.



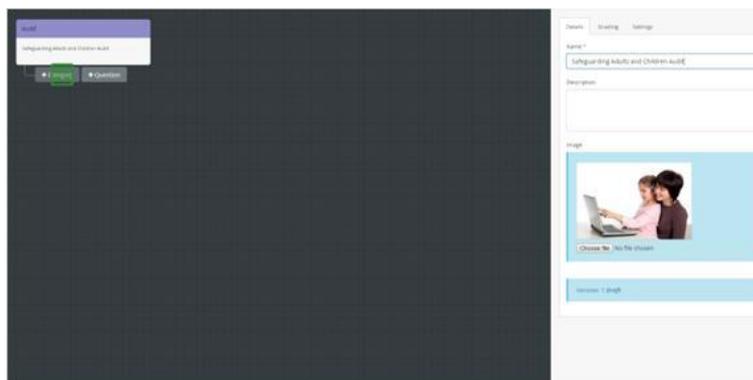
Please enter the details on the creation form.

You will be able to upload an image which relates to your audit.

To note: an image is not mandatory but is quite an appealing feature.



Submit to start the build.



The structure of your audit:

Let's explore the left hand side of the screen:

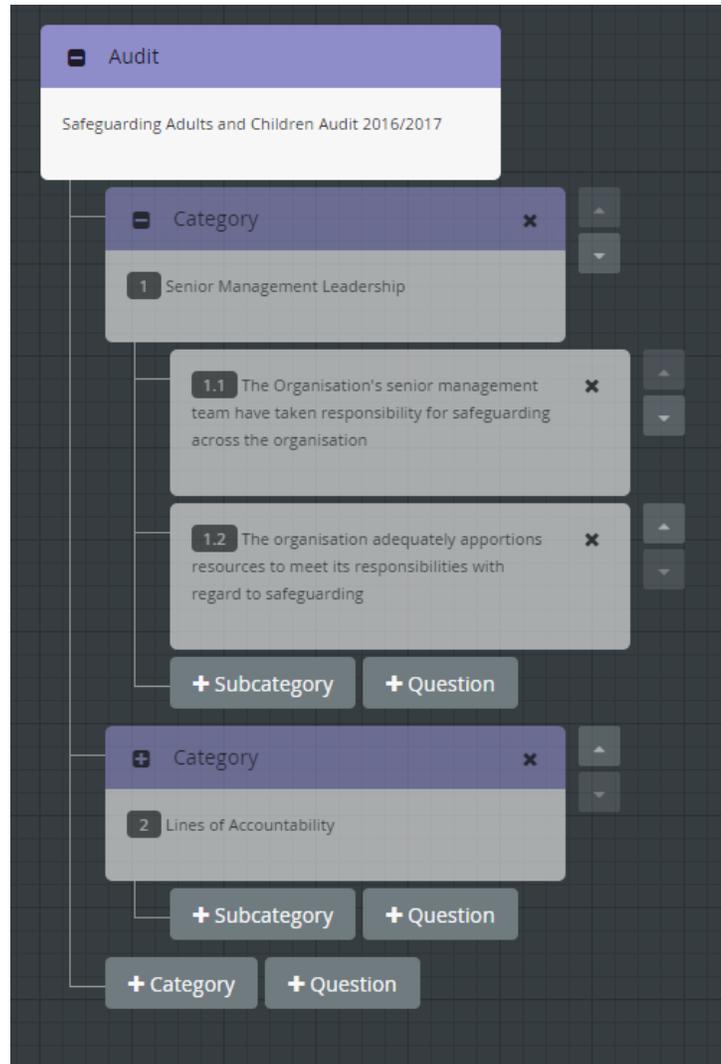
Audit - Here is your audits' title

Category – You can have as many categories as required. Questions can be housed inside or outside categories and they help to structure your audit.

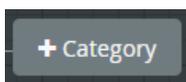
Question – This is the element of the audit where you want to gather information.

Questions can be direct, indirect or even statements for confirmation.

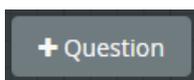
The tool has been designed to be completely flexibility



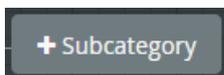
More features explained:



Select this icon to add a new category. This new category will appear on the top level of the audit



Select this icon to add a new question. This can be outside or within a category



Select this icon to add a new category, within a category.

Let's explore the right of the screen:

Here you can edit the name, description or the image of an audit.

Other options include grading and settings:

Grading

Here you can outline how you would like to grade your audit which will be directly related to the score of an individual audit when being completed.

Using the various options available you are able to name your various grades and assign the percentages on which they should appear. Click on the colour to select ones to suit you. Please see the example.

Settings

When a User completes an audit they will be able to carry out on-going updates.

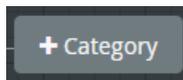
All activity is recorded but should you wish to monitor this further please select the 'Require Reason For Change' box which will bring up an additional text box when Users update their

audit asking for additional written feedback for their changes.



Select a category

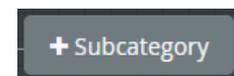
Select



Please enter the details of the category which will be displayed to the user when they access the audit and select the category to explore further. The name of the category will be displayed clearly on the audit overview. The description and help will appear when the user selects the category.

It's that easy!

To note: if you wish to place a category within a category please select



Select a question

Select  anywhere you wish a question to appear

Here you can enter the question you wish to ask.

The description and help are not required but will help direct and support your Users through the audit.

If you are building an audit with questions which may not apply to everyone please tick the 'Not Applicable' box. The audit will then be scored without this question.

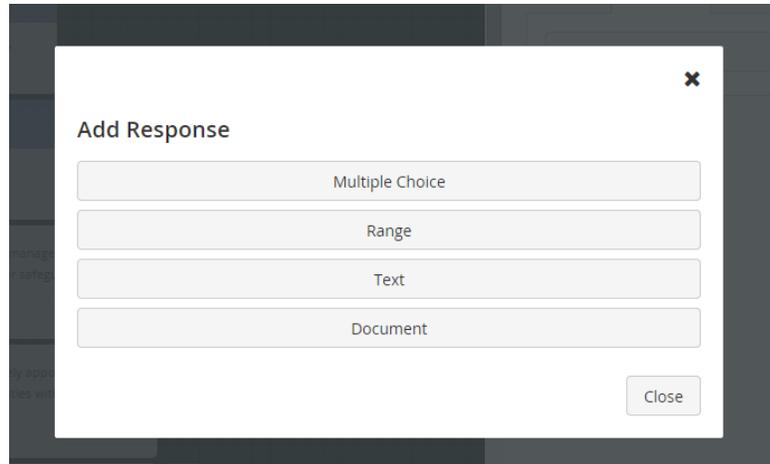
You'll have noticed the two tabs at the top of the question box:

'Details' have just been outlined above. 'Response' allows you to create the various response formats which allow your Users to answer the question.

Lets' select this option:

Select 'Add Response'

You have various Options:



We will explore these now.

Adding a Response

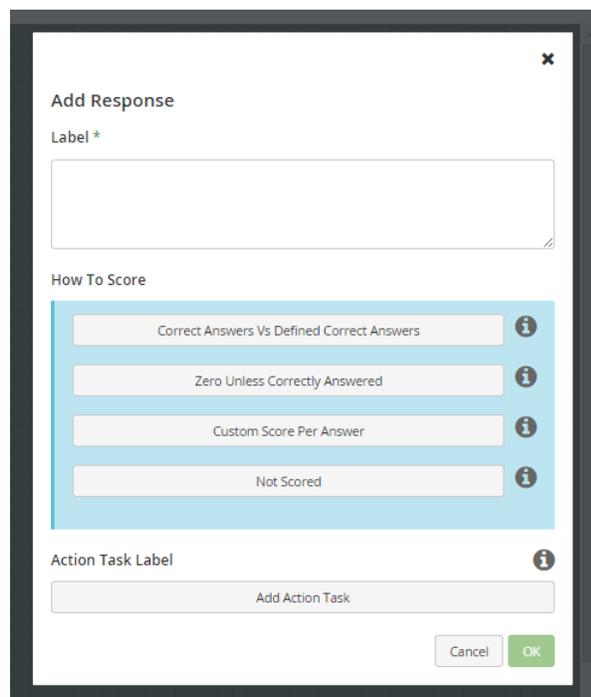
Multiple Choice

There are 4 different options available.

Before you start please enter a 'label'. This can be anything you wish which explains to the User the action you are expecting from them.

For Example:

'Please select a relevant grade'



a. Correct Answers Vs Defined Correct Answers

This response will let you enter a series of multiple choice responses.

Ticking the box marked 'correct' will positively score that answer.

Using this response means a User will get scored for any answer they give, should you have marked it correct. They will score 0 for any answer not ticked 'correct'.

All scored are marked as a percentage out of 100%.

For example – having selected 2 responses as correct, should the user select one correct response and one incorrect then they will score 50% for this question.

The screenshot shows a quiz question titled "Which of these is a type of tree?". Below the question is a "How To Score" section with four options: "Correct Answers Vs Defined Correct Answers" (selected), "Zero Unless Correctly Answered", "Custom Score Per Answer", and "Not Scored". Each option has an information icon. Below this is a "Responses" section with three rows. The first row has "Elm" in a text box, a checked "Correct" checkbox, and a close button. The second row has "Oak" in a text box, a checked "Correct" checkbox, and a close button. The third row has "Christoper" in a text box, an unchecked "Correct" checkbox, and a close button.

b. Zero Unless Correctly Answered

This is similar in style to response type (a).

The difference here is unless the user selects ALL the answered mark 'correct' then they will not score at all.

Should they select any of the answers NOT marked 'correct' then will also not score at all.

All scored are marked as a percentage out of 100%.

The screenshot shows a quiz question titled "Which of these is a type of tree?". Below the question is a "How To Score" section with four options: "Correct Answers Vs Defined Correct Answers", "Zero Unless Correctly Answered" (selected), "Custom Score Per Answer", and "Not Scored". Each option has an information icon. Below this is a "Responses" section with three rows. The first row has "Elm" in a text box, a checked "Correct" checkbox, and a close button. The second row has "Oak" in a text box, a checked "Correct" checkbox, and a close button. The third row has "Christoper" in a text box, an unchecked "Correct" checkbox, and a close button.

c. Custom Score Per Answer

This multiple choice response type will let you choose your own score as a percentage per answer.

This will allow you to weight some answers more heavily than others.

All scored should be marked as a percentage out of 100%.

The grading system which is most commonly used would be.

Grade 4 = 100%

Grade 3 = 75%

Grade 2 = 50%

Grade 1 = 25%

Grade 0 = 0%

Add Response

Label *

Which of these is a type of tree?

How To Score

- Correct Answers Vs Defined Correct Answers
- Zero Unless Correctly Answered
- Custom Score Per Answer
- Not Scored

Responses

Elm	25	x
Oak	75	x
Christoper	0	x

Add Response

d. Not Scored

This multiple choice response will allow you to set a grading system which is not to be scored.

For example: You may have a question which is an information gathering exercise, 'Do you like chocolate?'

Obviously the answer is 'yes – always!' but someone should not be marked down otherwise

Add Response

Label *

Which of these is a type of tree?

How To Score

- Correct Answers Vs Defined Correct Answers
- Zero Unless Correctly Answered
- Custom Score Per Answer
- Not Scored

Responses

Elm		x
Oak		x
Christoper		x

Add Response

Range

Range allows you to create a sliding scale for your Users to select their response.

Start – input the lowest item on your scale

End – input the largest item on your scale

Step – input the measured number your Users can select – e.g. increments of 5 or 10.

Not Scored – no score will be given for this response

Invert score – your scoring structure will be reversed.

The screenshot shows the 'Add Response' form. At the top, there is a 'Label *' field with the placeholder text 'Please place yourself on this scale'. Below this is the 'Range Options' section, which includes three input fields: 'Start *' with the value '0', 'End *' with the value '100', and 'Step *' with the value '20'. There are also two checkboxes: 'Not Scored' and 'Invert Score', both of which are currently unchecked.

Important to note:

In both Multiple response and Range response you'll be able to add an 'Action Task Label'.

The screenshot shows the 'Action Task Label' form. It has a title bar with an information icon. The main content area contains a single input field with the placeholder text 'Add Action Task'. At the bottom right, there are two small buttons, one white and one green.

These are pre-populated Action Plans which will be automatically allocated to an audit should a User select a certain response.

For example; should someone answer 'Not at all' to the question 'Do you like chocolate' you may set an action plan to be assigned such as 'have you tried a chocolate fondue? It's amazing!'

Selecting the option will see it expand.

The drop down box will let you select the response options you have created.

In the larger box you'll be able to write your action plan to be automatically triggered.

You can enter as many as you like.

The screenshot shows the expanded 'Action Task Label' form. It has a title bar with an information icon and a close button. The main content area is divided into two sections: 'Multiple Choice Response Option *' with a dropdown menu, and 'Action Task Description Label *' with a large text area. At the bottom, there is an 'Add Action Task' button.

Text

This option will automatically generate a text box for your users to enter any text based information.

The label box will let you describe how you want to text box to be used.

Selecting Mandatory will make sure the User inputs information in the box before completing the question.

Document

This option will automatically generate a document upload option on your question.

This will allow your Users to upload a maximum of 20 documents per question.

Selecting mandatory means the User will be required to upload a document before they can complete the question.

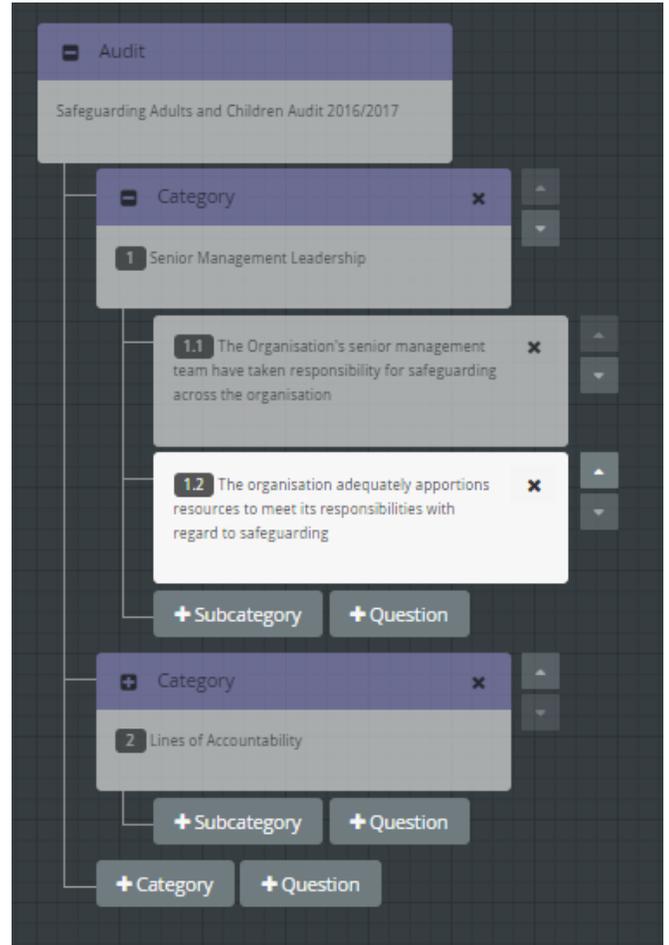
Reviewing our audit

Now we know how to create Categories, Questions and apply responses we may wish to review our audit structure.

As you have been building your audit it will grow on the audit tree to the left of the screen.

The section of the audit you are working on is always the item highlighted.

Using this structure you are always able to see your audit.



What do I do should I need to change something?

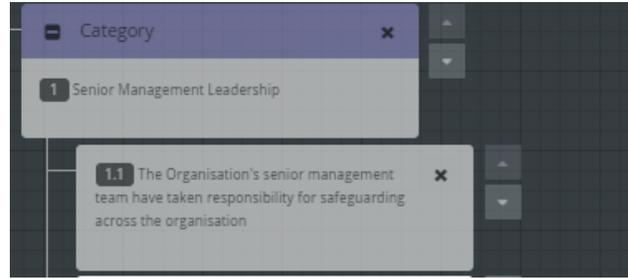
You are always able to edit your audit categories and question by simply selecting them from the Audit tree and adapting them.

Should you wish to remove a response type simply select the 'x' icon in the corner of the box.

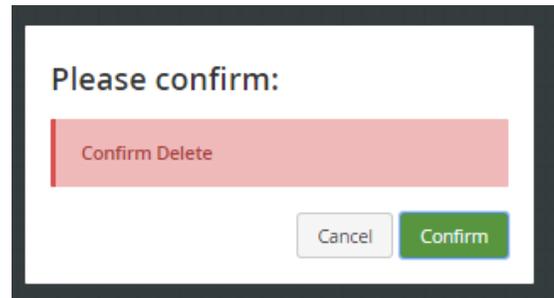
Clicking 'Edit' will let you change the elements of your response type.



Should you wish to edit any element of your Audit tree simply follow a similar pattern of using the arrows and crosses.



Don't worry – if you accidentally try to delete a category or a question you will be warned.



Saving and/or publishing your audit

In the top right hand corner there are a number of options available:



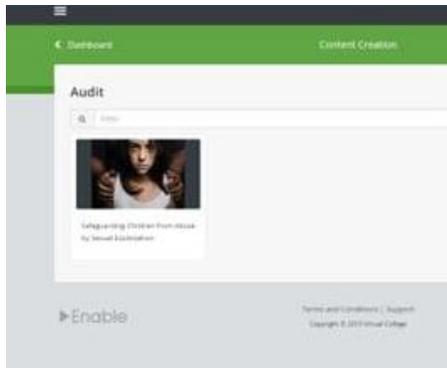
Save Draft – this lets you save your progress. This is useful should you wish to build your audits in installments.

Publish – this lets you complete your audit.

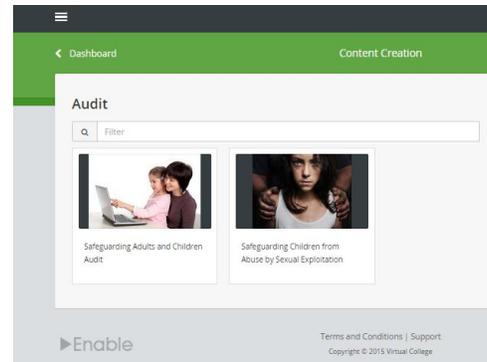
Exit – this will let you leave your audit. **You should always select this after 'Save Draft' to save your information before exiting.**

Viewing previously created audits

Recalling the start of our journey we logged into the system, selected the menu option selected 'create content' and we were brought to our audit repository:



Now we have started building our audits we have two audits in our repository.

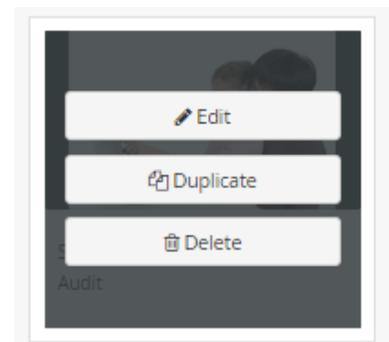


When hovering over an audit you will receive 3 options:

Edit – go back into your audit tree to update/amend

Duplicate – create an identical copy of an audit to update/amend

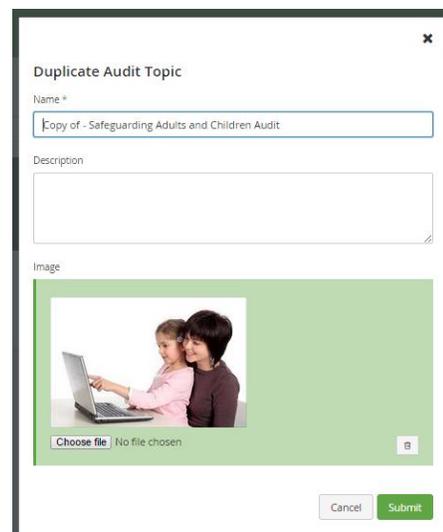
Delete – remove the audit from your system



Let's focus on Duplicate:

In the name box you'll be able to rename the copy of the audit. And selecting 'submit' will create this identical copy.

You may wish to use this when updating your audit for the following year while keeping the original version.



Additional information

 This little symbol will give you useful and helpful advice throughout your audit journey.

Always save your information - I did while making this document and I'm glad I did!