



IT TRAINING GUIDE

for

Personal Use or for Training Others

When self-learning about software or when training others to use software it is accepted practice that those training must carry out the computer functions themselves.

Therefore when training others it is recommended that the ‘trainer’ demonstrates the functions (probably using a projector) with those being trained mirroring the mouse/ keyboard actions on the computer available to them.

This suggested training guide concentrates on the essential functions of the College Review software with the order of the training sections reflecting a progression for those using the software for self-evaluation and improvement at department level.

The more advanced software functions are listed towards the end of the document and can be addressed when time permits, or when the need arises.

There are fourteen main functional areas that all those using, or managing the use of, Independent School Review (ISR), regularly, should be aware of and able to use:

For those who are using the software at Department level the following progression in learning to use the software may be found helpful.

Stage 1

Initially it may be decided that departments (academic, or non academic, or houses) will undertake self-evaluation using an appropriate workbook, an M.S. Word document. They will enter self-evaluation information (strengths, evidence, improvements recently achieved and areas for further improvement) and provide narrative comment on their self-evaluation.

Sections 1 – 4 of this training document provide the necessary knowledge of the software to undertake this task.

Stage 2

A department may then wish to use the software more extensively by transferring their self-evaluation information from a workbook into the software, score their practice, record action points and prepare improvement action plans.

Sections 5 – 8 of this training document provide the necessary knowledge of the software to undertake this task.

The remaining sections are for those managing the use of the software, or using all its functionality.

The ‘training’ sections

- 1. Setting up the computer;**
- 2. Accessing the various forms of Help;**
- 3. Opening files, creating new files and saving files;**
- 4. Accessing workbooks to support self-evaluation;**
- 5. Creating a self-evaluation document from a workbook.**
- 6. Entering self-evaluation data, scoring quality statements and data transfer;**
- 7. Creating automated self-evaluation report documents;**
- 8. Entering the detail of action points;**
- 9. Creating action plans;**
- 10. Creating central master files;**
- 11. Creating and using group files;**
- 12. Entering Balanced Scorecard information;**
- 13. Creating Balanced Scorecard report documents;**
- 14. Creating Balanced Scorecard Comparison Reports**

Those using the software should also be aware of a few additional features that are important

1. SETTING UP A COMPUTER

If a prospective user of the ISR software has limited access rights to their computer, installation of the program may need to be carried out by an IT Administrator since **full Administrator Rights are required to load the program.**

If the user's computer is restricted to 'Limited User Rights' Read, Write and Delete permissions need to be given to the licence directory in the Registry and the Program directory in C:\Program Files. **These permissions are usually put in place on installation.**

After installation the IT Administrator/ User will need to set the default location settings for

- saving working files;
- saving report documents;
- accessing the School's evidence library;
- accessing the School's Management Information System;
- accessing the AdaLicence file

To establish these settings:

- click '**Options> Default Location Settings**' on menu bar in the **main program**;
- click '**Select a different directory**' for any of the default location settings and then select the drive and location for the settings required. The IT Administrator may need to establish the relevant folders on a suitable server;
- click '**Scorecard**' to access the Balanced Scorecard inclusive program;
- click '**Options> Default Location Settings**' on the menu bar of the **Balanced Scorecard program**;
- click '**Select a different directory**' for any of the default location settings and then select the drive and location for the settings required. The IT Administrator may need to establish the relevant folders on a suitable server;
- carry out the same routine for the **SWOT** inclusive program which is accessed by clicking '**Improvement>Strategy Planning using SWOT**'

Correct installation and appropriate settings will enable the program to be operated effectively, and efficiently, by the User as required by the school's IT specialist.

The IT Administrator, or the ISR manager should ensure that the 'token' AdaLicence file which is supplied to every licenced user is located in the AdaLicence folder to ensure that the program is licenced when opened in any computer.

2. ACCESSING THE VARIOUS FORMS OF HELP

To access the various forms of Help:

- click '**Read**' on the initial 'Splash' screen to open the 26 page **User Guide** in PDF format. This can be printed out and used as a reference document. There is a page index at the back. The User Guide can also be accessed by clicking '**Help**' on the main menu bar and then '**User Guide**';
- at the '**Quick Tutorials**' screen, after the Splash Screen on opening the program, select and click a required tutorial. These tutorials are in MS PowerPoint format and go through all the main functions of the program. The Quick Tutorials can also be accessed by clicking '**Help**' on the main menu bar and then '**Quick Tutorials**';
- click '**Help**' on the main menu bar and then '**Contents**' to access traditional help files which describe all the software features.
- with access to the Internet click the **.html button** on the QuickStart screen or the **mini website** link on the **Help** menu to access the mini website 'Working with Independent School Review'

- There is a separate **User Guide**, **Quick Tutorials** and **Help** file for the Balanced Scorecard feature, and separate **Quick Tutorials** for the SWOT feature.

3. OPENING FILES, CREATING NEW FILES AND SAVING FILES (ESSENTIAL FOR USERS)

Those learning how to use the ISR software should do the following in the main program:

1. **Opening a file:**
 - click '**File>Open**' on the main menu bar or click '**Open**' at the **QuickStart** screen;
 - view the files in the C:\Program Files\Independent School Review 3.1\Current folder;
 - select a file to open, e.g. Consensus 092006.ada, and click **Open**.
2. **Creating a new file:**
 - click '**File>New**' on the main menu bar click '**New**' at the **QuickStart** screen;
 - an 'untitled' new file will be opened;
 - it is recommended that new, untitled files are immediately saved.
3. **Saving a new file:**
 - Click '**File>Save As**' on the main menu bar;
 - In the top right hand box enter the file name, e.g. '**test**';
 - Click '**Save**'
4. The same options and process should be followed for the inclusive Scorecard and SWOT programs

4. ACCESSING WORKBOOKS TO SUPPORT SELF-EVALUATION

Those undertaking department self-evaluation or facilitating self-evaluation workshops will need to choose the form of workbook to support the planned self-evaluation project.

There are 2 ways to access the menu for self-evaluation workbooks:

- click the '**Text**' button on the QuickStart menu on opening the program;
- click '**Help>View Workbooks**' on the main menu bar;

All workbooks are in 'table' format in MS Word. All workbooks have blank spaces where strengths and supporting evidence, improvements in last 12 months and areas for further improvement and can be entered. Workbooks can be emailed to, and returned from those who are not using the ISR software.

A workbook can be printed out for use as a reference document, or to make notes, in which case the spaces for entering these notes (cells in the tables) should be sized appropriately before printing out.

Those learning how to use the software could do this for a short workbook - say Investors in People. The workbooks can be used in electronic format where the spaces for text will automatically expand (Use the 'Table/ Properties/Cell feature' in MS Word if the setting for text format in a cell is incorrect). To view an illustration workbook with text go to **Help>View Workbook Reports** and open the **Workbook_IIP_withnotes**

Please note that each listed quality statement has its short heading asterisked. The text may be relevant to other quality statements which are listed. An asterisk needs to be added if the text should be automatically transferred to additional quality statements. Text which is typed into the boxes can be automatically transferred to an open file by using the **Import Notepad Text** feature on the **File** menu (see section 6 below).

5. CREATING A SELF-EVALUATION REPORT FROM A WORKBOOK

If a Department has entered its self-evaluation comments, possibly with a grade for each group of quality statements, in an appropriate workbook, a full report can be created by entering appropriate narrative text for each section in most workbooks. This simple form of report may be appropriate for some schools.

To view a workbook which can be used as a report go to **Help>View Workbook Templates** and open a workbook for academic departments. Note the space for the author's summary of the position for the whole section at the start of each section.

Also note that quality statements concerning a similar major topic are grouped together so that they can be considered together. Self-evaluation comments, however, can be entered against the relevant quality statement. This speeds the time to consider all relevant quality statements.

Completed workbooks should be saved from M.S. Word into the Workbook Reports folder either within the ISR program, or as located on a server. Clicking **Help>View Workbook Reports** will access this folder containing saved documents.

A self-evaluation document created from a workbook will only show self-evaluation information and the author's comments. Whilst potential areas for improvement will be shown there will not be an action plan. To create a action plan the self-evaluation information needs to be imported into a saved file in ISR so that action points and an action plan can be created.

6. ENTERING SELF-EVALUATION DATA, SCORING ISSUES AND DATA TRANSFER

Those undertaking department self-evaluation or facilitating self-evaluation workshops will need to be able to enter scores and notepad information from consensus group workshops. In some cases this may be entered 'in real time' by an 'assistant' working with a workshop facilitator.

To be familiar with the process of entering data directly to the software take the information in **Appendix 1:**

1. Ensure that your '**test.ada**' file is open
2. For each of the 2 'issues' in Appendix 1A
 - Locate the quality statement screen by clicking '**Index**' at the bottom of the program screen and then selecting clicking the sections in the left hand screen to show the issues in each section in the right hand screen. When you have identified the location of each issue in 'Index' double click to go to the issue scoring screen;
 - Note the number in the top right hand corner of the box with the issue text. This is the consensus agreement for the grading of the issue (3 = Critical - red, 2 = Important - yellow, 1 = relevant - blue). Click the appropriate button on the '**traffic lights**';
 - Note the score for the issue (4=85%, 3=65%, 2=35% and 1=15%) and enter the score by clicking the radio buttons;
 - Click '**Notepad**' towards the bottom right hand corner of the screen and enter the notes to the appropriate boxes in the Notepad feature. **Click 'OK' when you have entered the text;**

All the workbooks have a similar format which enables notepad text, but not scores to be transferred directly to the software:

To learn how to transfer notepad text into the software

1. Ensure that your '**test.ada**' file is open
 - Go to '**File>Import Notepad Text**' on the main menu bar;
 - You will be asked to ensure that the MS Word program is closed;
 - A folder listing the Workbook documents will then appear;
 - Highlight the file 'Workbook IIP with notes';
 - Click '**Open**' towards the bottom right hand corner of the screen;
 - A message will appear telling you that the text transfer is complete.
2. Click '**Index**' and you will find that the notepad text from that file has transferred to your 'test.ada' file.
3. The important thing to check is that the relevant quality statements in the list in the workbooks have an asterisk after the short heading.
4. Open the file 'Workbook IIP with notes' to check what this point.

7. CREATING AUTOMATED SELF-EVALUATION REPORT DOCUMENTS

A major output from the software are the various automated self-evaluation report documents for departments, the school, for Governors or for recording the position against inspection or quality standards provided that self-evaluation information has been gathered. Those managing self-evaluation should do the following to learn how the various reports are prepared and what they look like:

1. Click '**File>Open>Consensus 092006>Open**' which has some illustrative notepad text;
2. To prepare self assessment reports concerned with the school click '**Support> Automated Self Assessment**';
3. Click to select a report, e.g. **Academic Department Report**, from the list of available self assessment reports;
4. When asked to save the report in the 'Report Documents' folder type in a new name, e.g. **Dept A test**, and click '**Save**';
5. Repeat this process, as required, to test other available automated reports or review the Illustrative report documents in the Report Documents folder;
6. To view self-evaluation report documents as created, or to view, click either '**Support> Report Documents**', '**Improvement>Report Documents**' or '**Help> Report Documents**' on the main menu bar;
7. Click '**Model**' on the main menu bar and then '**Self-evaluation Report**' and repeat the process to create a self-evaluation report document against the 32 criterion parts of the EFQM Excellence Model;
8. Click '**Standards**' on the main menu bar, then a quality standard and then '**Self-evaluation Report**' and repeat the process to create a draft self-evaluation report against the assessment criteria of the quality standard selected, e.g. Investors in People;
9. Highlight the report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

The automated process for producing these reports can only extract relevant Notepad information. It is not possible to create quality, narrative, summary text.

Space is provided on all report documents for the author to add their narrative text either before a quality statement, or group of quality statements, and to add summary narrative for a whole section. This provides the mechanism for producing a Department Report, a Report for the Senior Management Team or a report for Inspectors.

All the automated self-evaluation documents are in 'Table' format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the Independent School Review software program.

Note: All the workbooks that set out the quality statements for the school, departments or Governors and the ISC and CSCI workbooks have space for the author to add, as an option, narrative text to summarise the comments entered in the workbook. This offers the option for departments to use the workbooks as a reporting tool, or to use the CSCI workbook as a report document.

The 'notepad' comments in the workbooks can still be transferred to the software for central purposes.

8. ENTERING THE DETAIL FOR ACTION POINTS

After undertaking self-evaluation and transferring self-evaluation information into the software, the key task is to review and prioritise the areas for further improvement and identify and detail the action points for an improvement action plan. Each of the 80 issues has a feature to detail up to 5 action points. Those managing self-evaluation should do the following to learn how to enter typical action point information to the software:

1. Take Appendix 2 which shows the detail of two action points in action plan format;
2. Ensure that your '**test.ada**' file is open;
3. For each of the 2 action points:
 - locate the quality statement scoring screen by clicking '**Index**', the sections in Index to locate the issue, highlighting and then double clicking the issue;
 - click the '**Action Points**' button towards the bottom right hand corner
 - enter the text for each '**Action Point**' (without the short heading for the issue) and the '**Success Indicators**'
 - using the drop down boxes select, or type in, '**Responsibility**' for the action point, any '**mini plan**' and the '**Dates**' involved;
 - enter any '**Progress Comments**', making sure to note the date initially;
 - always click '**OK**' to save the text that you have entered or it will be lost on exiting the featured.

9. CREATING ACTION PLANS

Having entered all your improvement action points the action point information will be organised by the software to create a range of action plans. Those learning should do the following to learn how the various action plans reports can be created in the format already noted under 9 above:

1. click '**File>Open> consensus 092005>Open**' which has some illustrative action point information;
2. to access the Action Plan screen click '**Improvement>Action Plan**' on the main menu bar;
3. click the top left drop down box to view the options for displaying action points, e.g. by ISC section, by CSCI section, by Every Child Matters outcome, by quality standard, by responsibility or by mini plan;
4. use the second drop down box to select a more detailed breakdown if required;
5. you can view the content of your selected action plan by using the scroll bar and page selection;
6. to create the selected action plan either click the central '**Print**' button or click '**Print**' on the main menu bar, then '**Action Plan**' and make the same selection that you have made on the action plan screen;
7. When asked to save the action plan in the 'Report Documents' folder type in a new name, e.g. Action Plan test 1, and click '**Save**';
8. Repeat this process to create other action plans;

9. To view the action plans that you have created click either '**Support>Report Documents**', '**Improvement>Report Documents**' or '**Help>Report Documents**' on the main menu bar;
10. Highlight the action plan that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

All the automated action plan documents are in tabular format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the software program.

10. CREATING CENTRAL MASTER FILES

You can build a central master file by importing notepad text from any number of department workbook reports. This central master file at school level can then be scored. Alternatively, if separate self-evaluation files have been created, the self-evaluation information can be transferred into a central master file.

Those managing self-evaluation should do the following to learn how this can be done:

1. Ensure that the '**test.ada**' file is open;
2. Go to '**File**' on the main menu bar and then click '**Text Transfer**';
3. Select '**Import**' (which means that you are going to import text to your 'test.ada' file)
4. Select '**Notepad**'
5. Select '**Merge**' (which means that the text that you will import will merge with any existing text, not overwrite it)
6. Select the file from which you wish to import the text - select **consensus 092006.ada**
7. Click '**Transfer**' to transfer and merge the text

You will find that the notepad text in the consensus 092006.ada file is now in your 'test.ada' file following any other notepad information that you have already entered.

11. CREATING AND USING GROUP FILES

One option in schools is to score the position in different departments after self-evaluation information has been gathered. This will best be achieved by having a consistent facilitator to ensure that similar scoring principles are used.

Another option is to score the position one year later.

In each case it will be appropriate to compare files.

Those managing self-evaluation should do the following to learn how this can be done:

1. Go to '**Compare**' on the main menu bar;
2. Click '**Create Group**';
3. This will reveal a screen that shows all the files (individual and group) that are available in the '**Files to Add**' box;
4. Highlight the files one by one that you wish to compare and click '**Copy**'
5. The content of the new group file will then show in the '**New Group**' box;
6. Click '**View**' to view the new '**Group**' file that you have created;
7. Go to an issue scoring screen and note that the '**Low, Average and High**' scores for the issue in the files in the new group file are shown;
8. Go to '**Section Summary**' where the bar chart has chevrons which show the position for all the issues in the section. All other bar charts have similar features.
9. Note the drop down box in the top right hand corner where you can select the file for which you wish to compare scores.

10. Go to '**Compare**' on the main menu bar and select '**Comparison Table**' to view how the scores of all files can be compared.
11. You can edit the contents of a group file by selecting '**Edit Group**' on the '**Compare**' sub menu.
12. **If at any time the drop down box in the top right hand corner of the screen fails to appear when a group file is open, which for technical reasons is possible, go to 'Compare' and click 'Show drop down box'.**

12. ENTERING BALANCE SCORECARD OBJECTIVES AND PERFORMANCE INFORMATION

The Balanced Scorecard feature to manage Key Objectives and their Key Performance Indicators (KPIs) is a free standing feature. Those learning should do the following to learn how to open and save Balanced Scorecard files, enter KPI performance information and create performance reports.

1. To access the Balanced Scorecard feature either click the '**Scorecard**' button at the QuickStart screen entering the software or click the '**Scorecard**' button at the bottom of an issue scoring screen;
2. Click through the initial scorecard screens and at the mini QuickStart menu click the '**New**' button to start your scorecard. (In practice you may customise a typical file)
3. Click '**File>Save As**', then name the file, say '**test**', and click '**Save**';
4. With the '**test.ads**' file open take **Appendix 3** which details 2 key Objectives to enter;
5. At the **Key Objectives** listing screen enter the 2 objectives under **Pupil Achievement**;
6. Then click the '**Performance**' button at the bottom of the screen to access the Performance Information screens for each key objective.
7. Use the drop down box to select the key objective and the enter the performance information from Appendix 3, including the performance ratings

13. CREATING BALANCE SCORECARD REPORTS

Having entered all the performance information for KPIs it will be necessary to create appropriate reports for a Balanced Scorecard. Those learning should do the following to learn how to create Balanced Scorecard reports based on the key objective performance information.

1. In the Balanced Scorecard program click '**File>Open> Scorecard Illustration.ads**'>**Open**';
2. Click the '**View Scores**' button at the bottom of the screen to view the 'traffic light' performance for all key objectives.
3. This screen can be exported as follows:
 - click '**File>Screen Information Export**';
 - drag the lines of the box to surround the area that you wish to export;
 - **right click the mouse** to view a menu and click '**copy image to clipboard**';
 - open MS Word and in a new file click **Ctrl + V** to paste the image to secure a copy of the overall key objectives performance screen in MS Word (adjust the page settings as required in MS Word).
 - Use a colour printer to obtain the colour print of this screen.
4. To obtain a Key Objectives Performance Report that details all the information on the Key Objectives Performance Information screens:
 - Click '**Print> Objectives Performance Report**' on menu bar;
 - Select the order for the Key Objectives to be listed (in order or with the worse performing Key Objectives listed first), - click '**Print**';
 - when asked to save the Performance Report in the 'Report Documents' folder type in a new name, e.g. **Performance Report test 1**, and click '**Save**';
 - To view the Key Objectives Performance Report that you have created click either '**Reports**' on the scorecard Print menu or '**Help> Report Documents**' on the top menu bar;

- Highlight the Key Objectives Performance Report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.
- The Key Objective Performance Report format for departments is slightly modified with a blank column so that department teams can insert comment before a meeting to discuss performance.

The automated Key Objectives Performance Reports are in tabular format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the software program.

14. CREATING BALANCED SCORECARD COMPARISON REPORTS

It is possible to cascade top level key objectives down to teams or even individuals.

In the scorecard feature there are 3 illustration scorecard files for departments. The key objectives are the same but the performance recorded is different.

It is possible to create a comparison file and a comparison report in MS Excel.

1. To create a Comparison File
 - Click '**Compare> Create Comparison Group**' on the top menu bar;
 - Select the 3 department illustration scorecards (one by one) and click the **Add to Group** button;
 - Enter the name of the new group file, say '**Group test**' and click '**Save Group File**'
 - You will note that the name of the file is now Group test.adc and if you click the **Performance** page you can note the following:
 - the detail of the targets for all the files has been created in the target boxes for the average file (click **Select File** on the top menu bar to view department files);
 - that you can enter any appropriate notes for the team;
 - that you cannot alter the performance rating it is the average of the individual files.
2. To create a Comparison Reports:
 - Keep the Group test.adc file open;
 - Click '**Compare>Comparison Report**' on the top menu bar;
 - A box to select the key objectives to compare will appear. Click '**Select those listed>Create Report**';
 - When asked to save the Comparison Report in the 'Report Documents' folder type in a new name, e.g. Comparison Report test, and click '**Save**';
 - To view the Comparison Report that you have created click '**Help> Report Documents**' on the top menu bar;
 - Highlight the Comparison Report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

14. OTHER FEATURES

Other important features, where you can use the Help files for detailed functionality, are:

1. The **Screen Information Export** feature, as described in section 12 above is available in the main program. Click '**File>Screen Information Export**' and use as above;
2. You can export your '**Notepad**' or '**Action Points**' text as a .txt file or your detailed scores for issues as a .csv file by clicking '**File**' then '**Export File Information**';
3. When saving files you have the option to make the files '**Read Only**' or '**User Only**', both password protected using the '**File Security**' option;
4. There are numerous **bar chart screens** to analyse and consider your scored position.

Independent School Review

Training Pack - Action Point information to enter

Overarching Objectives and Introduction Notes

Part of action plan for Deputy Head

Improvement Action Point (what we plan to do)	Success Indicators	Responsibility	Assess & Review Dates	Last Progress Report (with date)	Deadline / Done Dates	College Review Ref. and Issue Heading
Advise all who assess pupil's work to identify, wherever possible, where there is opportunity for the pupil to improve and included this in the assessment	Much more comment on opportunities for pupil improvement as assessments	Deputy Head		1.11.2006 All relevant staff advised	01/11/06 01/11/06	32.1 Assessment Information **
Identify links in the community to work with to provide pupil experience in voluntary service	Links identified and in place	Deputy Head		1.11.2006 Links identified and in place	01/11/06 01/11/06	5.1 Extra-curricular activities ***



Key Objectives - Performance Report

Organisation		Red	Red as defined
		Amber	Amber as defined
Report dated	[date]	Green	Green as defined

Key Objective Performance Report Overview
Authors narrative comments

No.	Objective Measure(s)	Targets	Baseline Performance	Responsibility	Last 4 Period Performance Strengths	Areas for Improvement Notes
1.4	<u>Parent Views on Education</u> The % of parents considering that the education provided by the school is good or better exceeds 80% % from survey returns	Green 80% or more Amber Between green and red Red Less than 75%	Last parent survey return showed 83%	Department Heads	Green Green Green Green Survey returns	Latest annual return is the performance for the term
5.5	<u>Academic Staff Development Days</u> Academic staff development days to exceed 5 per year Average academic staff days allocated to development in the last 12 months	Green 5½ days or higher Amber Between green and red Red Under 4½ days	Currently averages 5.2 days	Deputy Head	Amber Red Green Green Academic staff development is focused on identified development needs only	Consider qualifications for advice and guidance for some academic staff