

# The Administrative Observer

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Manual Revision 5.5

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## License Agreement

**The Administrative Observer**, its documentation and other supportive materials are licensed by Preferred Educational Software to the original purchaser for use at a single building. You are not permitted to share this software, its documentation or supportive materials with anyone except as noted below.

Multiple installations of **The Administrative Observer** desktop software are permitted at a single building. Only those individuals employed and assigned to that building may legally use the software or its documentation. Individuals legitimately entitled to use the product at work may also install it on their home computers.

**The Administrative Observer** handheld software is licensed per device and requires a device specific unlock code for activation. Multiple installations of the handheld software are allowed when a license for each handheld device used is purchased.

## Copyright Notice

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is fully protected under  
United States copyright law.

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## Revision History

New in Version 5.25 – Added support for iPhone & Android handhelds via Mobile Web

New in Version 5.2 – Added support for Blackberry handhelds

New in Version 5.1

- Added pop-up lists for convenient, consistent data entry
- Improved backup and restore functions in the Observation File Manager
- Improved export to MS Word format
- Greatly expanded support for a variety of handheld devices
- The Administrative Observer Professional (optional companion software) available for powerful analysis of completed observations
- Online resources added, including quickstart tutorial library  
Visit <http://www.42regular.com/quickstart>
- Added downloadable library of useful templates
- Expanded database of supplied performance indicators
- Training specialists available for remote or onsite training.  
Visit <http://www.42regular.com/training> for info.

New in Version 4.1

- Ability to export documents to XLS format
- Ability to customize the report signature block and toggle it ON or OFF
- Support for Pocket PC devices using Windows Mobile 2003 OS

New in Version 3.7

- Support for Pocket PC handheld devices
- Ability to export documents to DOC, PDF, and HTML formats
- Printing option to print on letterhead
- Comprehensive Video Help Tutorials

New In Version 3.0

- Comprehensive database containing hundreds of quality indicators.
- Improved hotsync conduit for better Palm module connectivity.
- Reorganized menu bar.
- Addition of **IDEAS+** and **IDEAS-** to store frequently used paragraphs and phrases
- Access to *The Administrative Observer* Manual from the **START** menu
- Button to clear quality indicators from page in preferences or in active evaluation.
- Support for Palm OS 5.

New in Version 2.0

- Palm handheld module for more convenient data entry
- Introduced Observation File Manager feature
- Added SAVE AS COPY and SAVE AS PREFERENCES features

Version 1.0 – Initial public release

## **Quick Start**

Users sometimes want to get started with **The Administrative Observer** quickly and read the manual only when obstacles are encountered. A collection of brief tutorial screencasts is available for this purpose at <http://www.42regular.com/quickstart>.

The quickstart user can also focus on essential tasks via select pages in this manual.

From CD, install the program on your hard drive – see page 10

Download and install the latest update of **The Administrative Observer** from Preferred Educational Software at [www.pes-sports.com](http://www.pes-sports.com) - see page 11

Establish your preferred starting point language – see page 17

Personalize the user and institution names – see page 18

Edit the preferences to reflect language you prefer – see page 23

Save your edited preferences – see page 23

Backup your edited preferences – see page 31

Users who purchased the available companion software for their handheld device should also complete the tasks listed below.

| <b><u>Task</u></b>  | <b><u>Page Reference by Device</u></b> |                  |                   |               |                |
|---|--|------------------|-------------------|---------------|----------------|
|   | <b>Palm</b>                            | <b>Pocket PC</b> | <b>Blackberry</b> | <b>iPhone</b> | <b>Android</b> |
| Install the handheld conduit                                    | 75                                     | 105              | n/a               | n/a           | n/a            |
| Install <b>The Administrative Observer</b> on the handheld      | 78                                     | 107              | 135               | n/a           | n/a            |
| Obtain registration code to unlock handheld or register license | 79                                     | 109              | 137               | 165           | 196            |
| Configure desktop software with assigned license credentials    | n/a                                    | n/a              | 139               | 165           | 196            |
| Download selected preferences to the handheld                   | 84                                     | 113              | 140               | 166           | 197            |
| Download pop-up lists to the handheld                           | 85                                     | 114              | 142               | 166           | 197            |

**The Administrative Observer** is fully operational when these steps are completed.

## Software Companions

### ***The Administrative Observer*** Standard Edition

*The documentation component* and the heart of this software trio. Tightly focused on helping administrators document classroom visits and evaluate employees. Standards-based templates and a large collection of performance indicators are included. All supplied language can be modified easily to reflect your district's locally approved language.

### ***The Administrative Observer*** Professional Edition

*The analysis component.* Examines collected observation files to create summary documents and graphs expressing trends and central tendencies. Provides support for data-driven school improvement and professional development. Companion software to the standard edition.

### ***The Administrative Observer*** Handheld Edition

*The convenience component.* Great for walkthroughs! The handheld edition really increases the convenience of data entry. Record observation thoughts using any supported handheld from the Blackberry, iPhone, Android, Palm, or Windows Mobile (Pocket PC) lineup. Companion software to the standard edition.

| <b>The Administrative Observer</b><br>Version Comparisons          | Handheld | Standard | Professional |
|--|----------|----------|--------------|
| Great for documenting classroom observations                       | x        | x        |              |
| Excellent support for school improvement and staff development     | x        | x        | x            |
| Easily accepts language from locally preferred observation model   | x        | x        |              |
| Prepares prompt feedback to teachers quickly and easily            |          | x        | x            |
| Generates observation summaries and evaluation documents           |          | x        | x            |
| Greatly increases convenience for classroom walkthroughs           | x        |          |              |
| Minimizes classroom disruption during observation                  | x        |          |              |
| Increases likelihood that walkthrough observations will be done    | x        |          |              |
| Analyzes large numbers of completed observation / evaluation files |          |          | x            |
| Expresses frequencies, trends and central tendencies               |          |          | x            |
| Creates summary graphs   |          |          | x            |
| Disaggregates collected observation data                           |          |          | x            |
| Periodic updates and enhancements at no cost                       | x        | x        | x            |
| Comprehensive training available                                   | x        | x        | x            |

## Installing the program

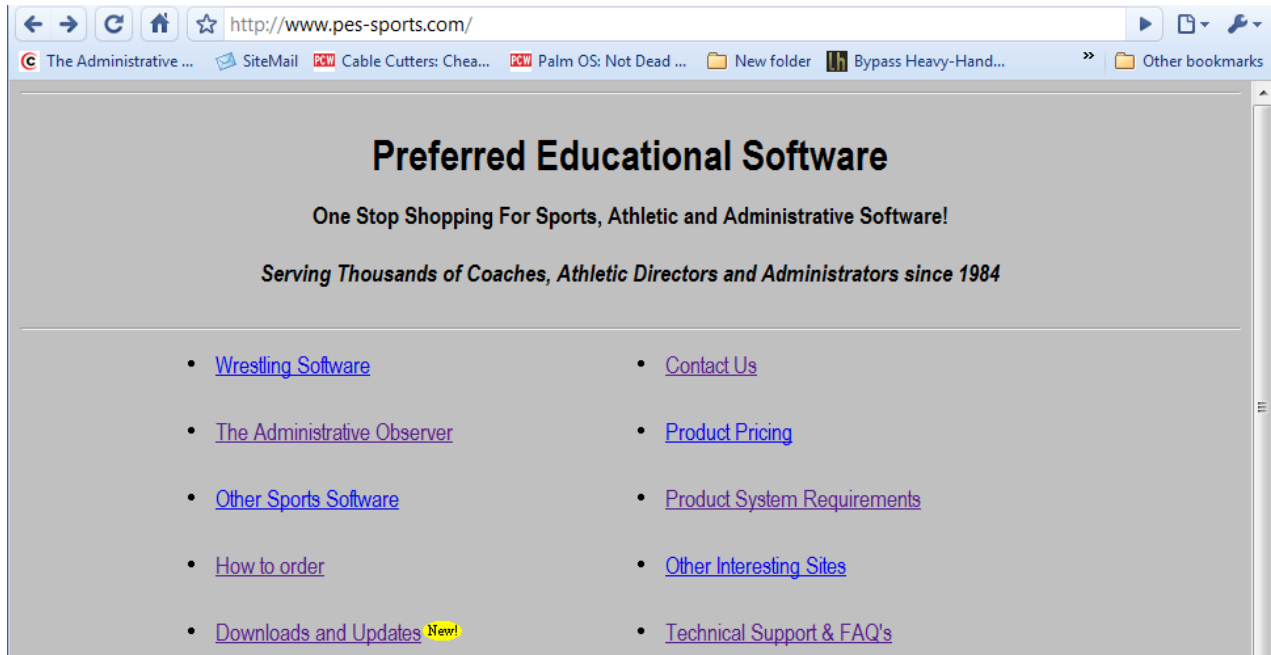
1. Close all programs. Your Windows desktop should be visible and all programs should be shut down.
2. Insert **The Administrative Observer** CD-ROM into your CD-ROM drive. An installation wizard will appear.
  - If the installation wizard does not begin automatically, select the RUN option from the Windows start menu. Enter X:\CD-Start.exe at the prompt. Substitute the drive letter of your CD-ROM for the X: in this example.
3. Click the **NEXT** button to begin the installation. Follow the prompts and respond affirmatively to accept the prompts as given on each screen.
4. When the installation wizard finishes, download and install the most current update from Preferred Educational Software at [www.pes-sports.com](http://www.pes-sports.com) - see page 10.
5. Users who purchased the companion handheld software should also complete the tasks listed below.

| <u>Task</u>   | <u>Page Reference by Device</u> |                  |                   |               |                |
|---|---------------------------------|------------------|-------------------|---------------|----------------|
|   | <b>Palm</b>                     | <b>Pocket PC</b> | <b>Blackberry</b> | <b>iPhone</b> | <b>Android</b> |
| Install the handheld conduit                                    | 75                              | 105              | n/a               | n/a           | n/a            |
| Install <b>The Administrative Observer</b> on the handheld      | 78                              | 107              | 135               | n/a           | n/a            |
| Obtain registration code to unlock handheld or register license | 79                              | 109              | 137               | 165           | 196            |
| Configure desktop software with assigned license credentials    | n/a                             | n/a              | 139               | 165           | 196            |
| Download selected preferences to the handheld                   | 84                              | 113              | 140               | 166           | 197            |
| Download pop-up lists to the handheld                           | 85                              | 114              | 142               | 166           | 197            |

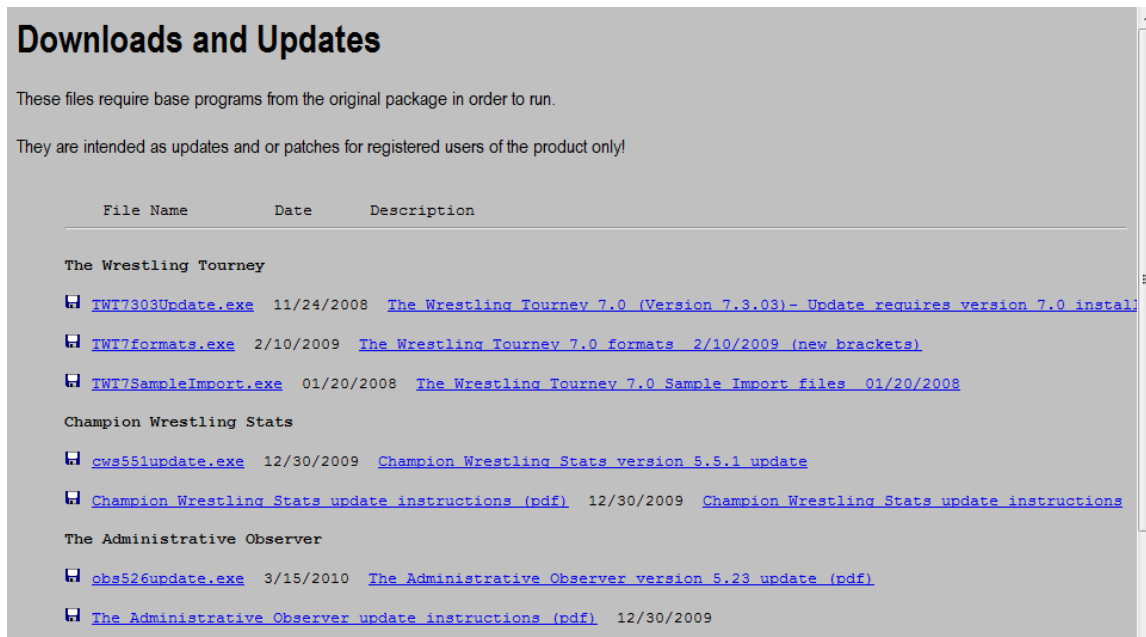
**The Administrative Observer** is fully operational when these steps are completed.

## Downloading and Installing the Most Current Software Release

Exit *The Administrative Observer*, activate your web browser, and enter the web address <http://www.pes-sports.com>. A page resembling the illustration below will appear.

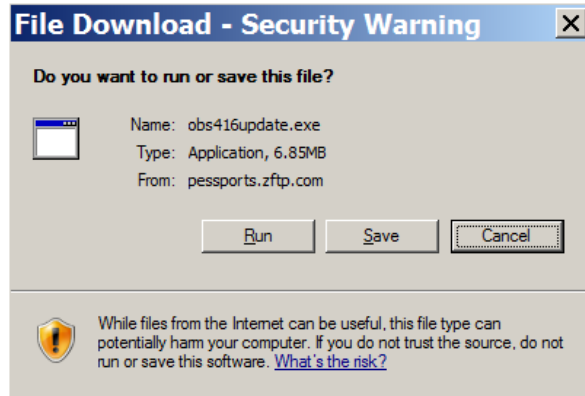


Click the **Downloads and Updates** button on the left. A new page resembling the illustration below will appear.

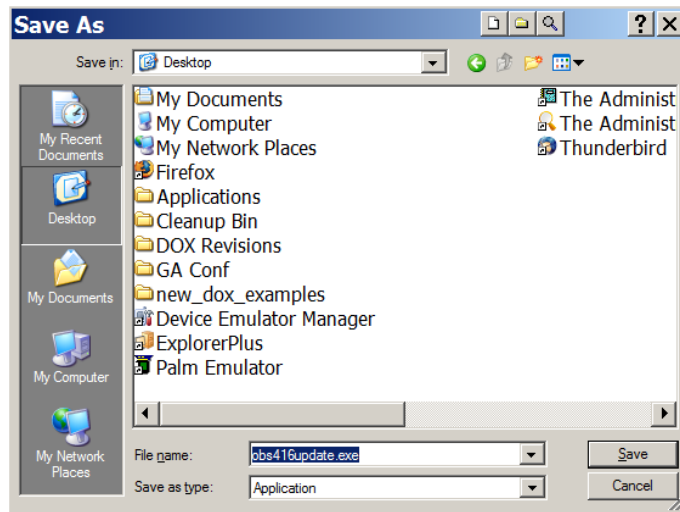


Scroll to the segment entitled *The Administrative Observer* on the left. Locate the file link entitled obs526update.exe. **Note:** The number you see in the middle of the file name *may be different*. Click the link.

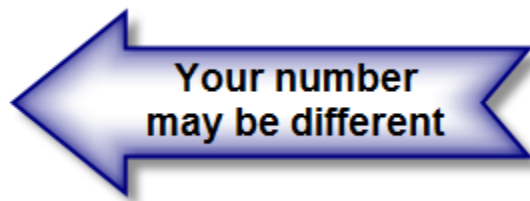
A security warning may appear as shown below. It is safe to proceed. To minimize issues related to connection speed or Internet noise, we recommend saving the file to your desktop rather than running the install from the download site.



Click the **SAVE** button to proceed. You will be prompted for the location you wish to use to save the file. A good location is your **DESKTOP** as shown below.

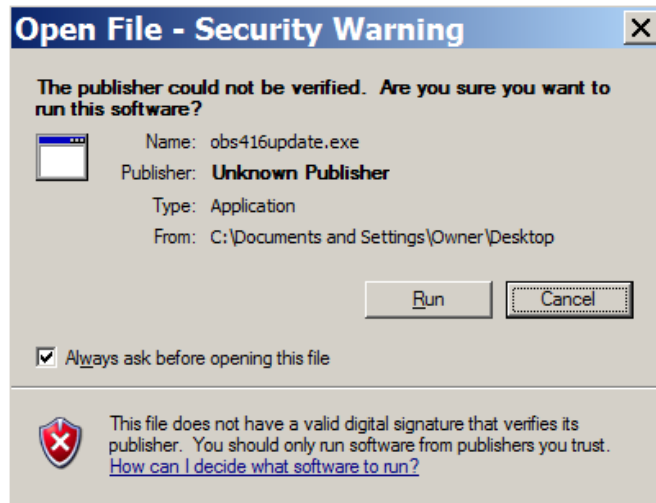


The file OBS526UPDATE.EXE will be saved to your desktop. An icon similar to the one shown below will appear.

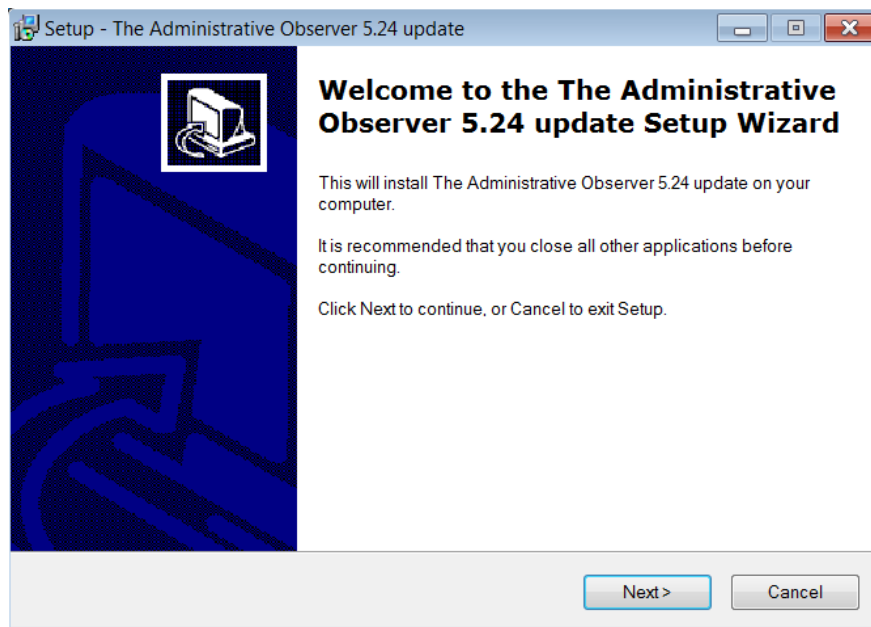


Exit your web browser and double click the icon to proceed. The downloaded file will update your desktop software, and, if applicable, your conduit, your handheld software.

A windows security warning will appear. The installation wizard is safe to run. Click **RUN** to proceed.



The installation wizard dialogue will appear.



Click **NEXT** to proceed. Accept the prompts as presented. You will be cautioned that certain files and directories already exist and will be overwritten. Allow that to happen.

**The Administrative Observer** desktop software is ready to use when the installation wizard finishes. Handheld users, however, must also install the handheld components appropriate to their device and install **The Administrative Observer** on their handheld. This is detailed in the handhelds sections of this manual. Please refer to the table of contents for page references.

**The Administrative Observer** is updated periodically. Users are encouraged to visit the website from time to time to download the most current software update at no charge.

## Running *The Administrative Observer*

Activate *The Administrative Observer* from the Windows **START** menu. Click

**Start | Programs | Administrative Observer | The Administrative Observer**

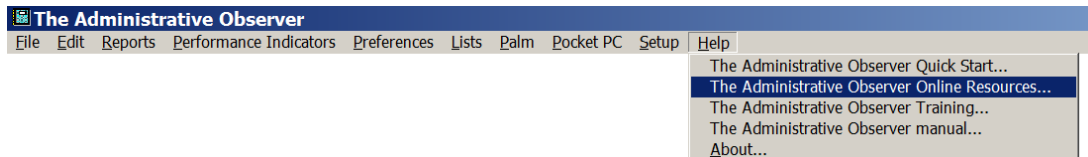
A shortcut icon to simplify program access should appear on the Windows desktop following installation. Some districts, however, disallow desktop changes without authorization. Consult your IT department for this authorization and assistance if the expected shortcut icon does not appear.

**Product Manual.** Users may view or print the comprehensive product manual by

- clicking **Start | Programs | The Administrative Observer | The Admin.Observer Manual**, or by
- selecting **Help | The Administrative Observer Manual** from the program menu bar while the program is running.

Users should obtain the latest version of the Adobe Reader from [www.adobe.com](http://www.adobe.com).

**Online Resources.** Extensive resources, including the most current manual revision and narrated quickstart screencasts, are available online. From the main program menu choose **HELP | THE ADMINISTRATIVE OBSERVER ONLINE RESOURCES**.



Additional help may be obtained from Preferred Educational Software technical support at 888-959-2016.

**Training.** Convenient, affordable, and personalized training is available via Internet or at your site. After customizing the training agenda to your specific needs, a certified training specialist will guide you and your colleagues, answer your questions, and get you off to a good start.

The typical half-day training session will minimize your learning curve and make you productive faster. Visit <http://www.42regular.com/training> for more information or call 815-222-3811 during normal business hours.

## Program Overview

### Purpose

**The Administrative Observer** was developed to save time in the creation of high quality observation summaries, evaluations, and job appraisals. The default preferences provided with the program address performance areas often thought to be important to employee performance. The program is highly flexible and can be used for any type of job category. The user is encouraged to customize each component to reflect individual preferences.

### Defining your preferences

**The Administrative Observer** contains default text and headings which may be used as supplied or modified to reflect your preferences. The program allows user definition in several areas. Modifications to customize the program can be made as often as the user might like.

All users should modify the default observer information. This is done by selecting **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar.

### Opening a new observation summary

Create a new observation summary by selecting **FILE | NEW OBSERVATION** from the menu bar. When prompted, the user should enter a meaningful file name to be used when saving the observation for future use.

### Entering your observation data

The user's observation data entry begins after the file name is given for the new observation summary.

### Previewing and printing your observation summary documents

The observation summary report can be previewed or printed at any time during the process of recording your observation.

### Use on handheld computers

**The Administrative Observer** allows data entry via Palm and Pocket PC handheld computers. See the section of this manual addressing handheld use for a complete overview.

***Detailed instructions for each process overviewed on this page can be found later in this manual.***

## Document Options

**The Administrative Observer** generates employee performance documents in several formats. After the observation data has been entered, any format of the summary report can be printed without re-entering data. Those formats are called

- Standard Observation Summary
- Paragraph Observation Summary
- Bulleted Observation Summary
- Bulleted with Notes Observation Summary
- Standard Observation Summary / Letterhead
- Paragraph Observation Summary / Letterhead
- Bulleted Observation Summary / Letterhead
- Bulleted with Notes Observation Summary / Letterhead

Examples of each format are illustrated in the Appendix to this manual.

Additionally, **The Administrative Observer** generates supportive documents entitled

- Pre-Observation Guide
- Observer's Checklist
- Performance Indicator Databases

The Pre-Observation Guide expresses the observer's performance priorities. It should be given to the employee in advance of a scheduled observation.

The Observer's Checklist expressed the user's preferences in a checklist format that is useful for data collection during a performance observation. Following the observation, this checklist simplifies data entry into **The Administrative Observer**.

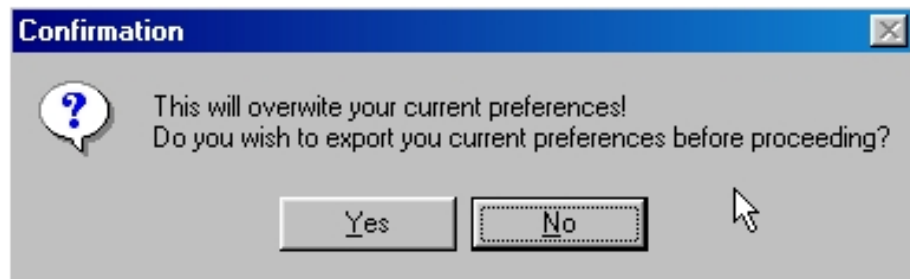
The Performance Indicator Databases may be printed for easy review prior to use.

Examples of these supportive documents are illustrated in the Appendix to this manual.

## User Setup

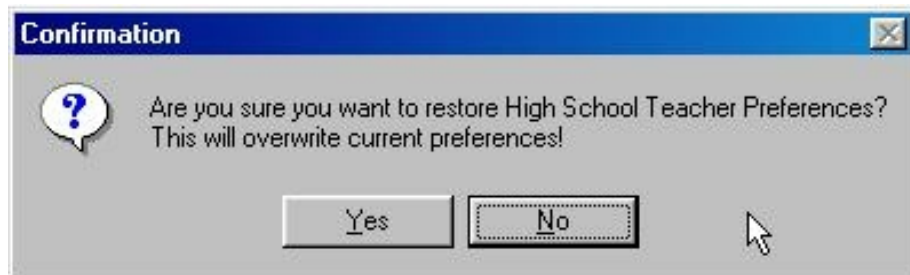
**Setting the Initial Job Category.** Before setting any other preferences, all users should select the initial job category of greatest interest. This can be done by accessing the Menu Bar at the top of the screen and selecting **PREFERENCES | SELECT DEFAULT PREFERENCES**. An array of choices will appear, and the user should select one.

Two dialogs will appear after the user selects the initial job category. The first will ask if the user wishes to export current settings before proceeding.



The normal answer to this dialog should be YES. However, the new user has no preferences to save yet, and should answer **NO** to proceed.

A second dialog will appear asking if the user wishes to proceed.



Click YES to establish the initial job category you wish to work with.

## Editing Observation Preferences

Establishing the default observer information.

All users should modify the default observer information. This is done by selecting **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar.

The following screen will then appear.

**Default Observation Preferences**

Section 1 | Section 2 | Section 3 | Section 4 | Section 5 | Section 6 | Closing

Preparation Ideas + Ideas -

Mr. Smith prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Smith clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn.

- Planned appropriate activities to fill available class time.
- Prepared sufficient instructional materials.
- Clear statement of instructional purpose.
- Established why lesson is important for students to learn.
- Reviewed student work from previous period.
- 
- 
- 
- 
- 

Reset Clear Entire Page

Print / View Sample Save Cancel Settings Search / Replace

Click the **SETTINGS** button to proceed.

The screen shown below will appear after the **SETTINGS** button is clicked.

**Default Settings**

Report / Title Choices      Observation Rating Scale      Observer Information

Header: Confidential

Title: Summary of Instructional Observation

Employee: Teacher

Observer: Observer

Subject: Class

Date Observed: Date Observed

Time: Time

# of Students: Students present

Objective:

Indicators: Quality indicators are shown below.

Agreement: I have discussed the information contained in this document with my principal and was given the opportunity to ask questions about its content.

OK      Cancel

All users should customize the **Observer Information** to reflect the user's name, organization, and current fiscal year year.

The **Observation Rating Scale** and the **Report / Title Choices** can also be tailored to reflect the user's preferences by clicking the appropriate tab. All settings can easily be restored to the supplied defaults if you change your mind.

Click on the **Observer Information** tab to reveal the screen below.

The screenshot shows a dialog box titled "Current Observation Settings" with three tabs: "Report / Title Choices", "Observation Rating Scale", and "Observer Information". The "Observer Information" tab is active and contains the following fields:

- Observer: Bill Craig
- Observer Title: Principal
- Organization: Washington School
- Fiscal Year: 2008-2009
- Report Preference: Standard Observation Summary (dropdown menu)

At the bottom of the dialog box are "OK" and "Cancel" buttons.

The user should enter the observer name, title, organization, and fiscal year at this screen. The user's Report Preference can also be established from this screen.

Click the tab entitled **Observation Rating Scale** after the Observer Information has been entered.

The screen shown below will appear when the **Observation Rating Scale** tab is clicked.

The screenshot shows a dialog box titled "Default Settings" with three tabs: "Report / Title Choices", "Observation Rating Scale", and "Observer Information". The "Observation Rating Scale" tab is active. It contains five rows, each with a label and a text input field:

|          |           |
|----------|-----------|
| Choice 1 | Poor      |
| Choice 2 | Fair      |
| Choice 3 | Good      |
| Choice 4 | Very Good |
| Choice 5 | Excellent |

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

The scale provided may be used, or alternative descriptors may be entered. Examples of alternative descriptors are given below.

|                      |                 |                |
|----------------------|-----------------|----------------|
| Exceeds Expectations | Mastery         | Superior       |
| Meets Expectations   | Partial Mastery | Excellent      |
| Does Not Fully Meet  | Emerging Skills | Satisfactory   |
| Does Not Meet        | No Mastery      | Unsatisfactory |

Click the tab entitled **Report / Title Choices** after the preferred descriptors for the **Observation Rating Scale** have been entered.

The dialogue below will appear when the **Report / Title Choices** tab is clicked.

Each element on this screen can be altered to reflect the user’s preference. For example, “Confidential” can be changed to read “TOP SECRET.” The text for HEADER could simply be deleted if no header is desired.

Three important concepts regarding the Report/Title Choices dialogue deserve special mention.

- The titles indicated are ***captions***, not content. This is not the place to enter a particular teacher’s name.
- Four areas of this dialogue are associated with optional pop-up lists to make data entry more convenient and consistent.

| Data Area | User Assigned Title | List Name  |
|-----------|---------------------|------------|
| Employee  | Teacher             | STAFF List |
| List 1    | Class               | List 1     |
| List 2    | Time                | List 2     |
| List 3    | Grade Level         | List 3     |

- Users who anticipate using ***The Administrative Observer Professional*** for analysis of completed observation files should assign titles for their lists to correspond with analysis variables.

Click **OK** when each text block reflects your preference. This will return the user to the Default Observation Preferences dialogue. Click the **SAVE** button to continue.

## Creating Current User Preferences

In addition to personalizing *The Administrative Observer* with user and organization name, language throughout the program can be edited to display user preferences.

### Editing Category Headings

Select **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar. The default preferences screen will appear.

The screenshot shows a window titled "Default Observation Preferences" with a blue title bar. Below the title bar are seven tabs: "Section 1", "Section 2", "Section 3", "Section 4", "Section 5", "Section 6", and "Closing". The "Section 1" tab is selected. Inside the window, there is a text input field containing the word "Preparation". To the right of this field are two buttons: "Ideas +" and "Ideas -". Below the input field is a text area containing the following text: "Mr. Smith prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Smith clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn." Below the text area is a list of seven items, each with a checkbox and a text field. The first five items are checked, and their text fields contain: "Planned appropriate activities to fill available class time.", "Prepared sufficient instructional materials.", "Clear statement of instructional purpose.", "Established why lesson is important for students to learn.", and "Reviewed student work from previous period." The last two items have unchecked checkboxes and empty text fields. At the bottom left of the window is a "Reset" button. At the bottom right is a "Clear Entire Page" button. Below the window are several buttons: "Print / View Sample", "Save", "Cancel", "Settings", and "Search / Replace".

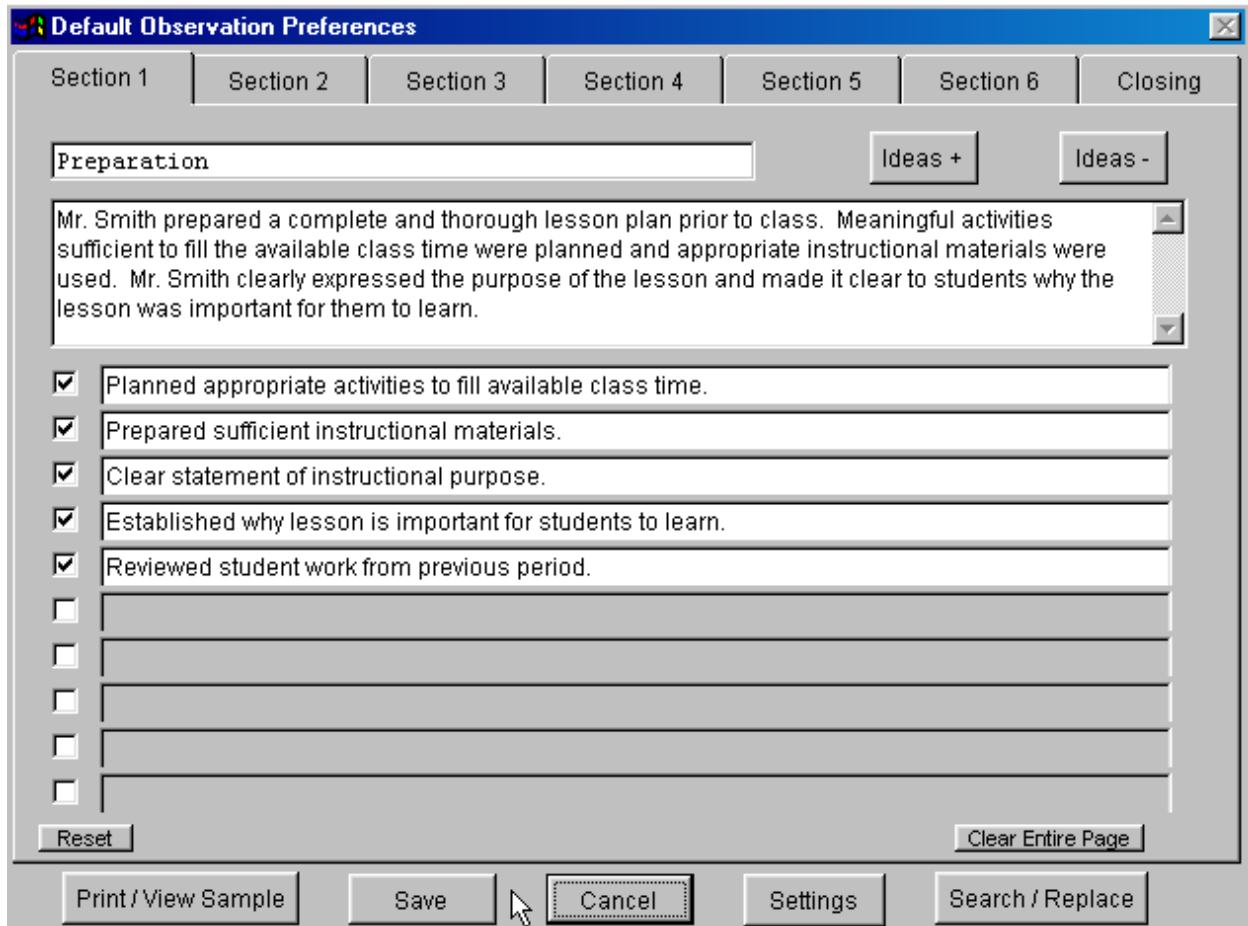
“Preparation” is the category name for section 1 in this illustration. The category name can be edited to display any text more useful to the user. For example, “pre-season activities” might be more useful when the program is used to evaluate a coach.

The category name for every section can be changed if desired. Click the **SAVE** button after all changes are made. Changes saved will become the active preferences for all subsequent observations or evaluations.

**Important Note:** Preferences used for earlier observations will remain unchanged.

## Editing Paragraph Text

Select **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar. The default observation preferences screen will appear.



The screenshot shows a window titled "Default Observation Preferences" with a blue header bar. Below the header are seven tabs: "Section 1", "Section 2", "Section 3", "Section 4", "Section 5", "Section 6", and "Closing". The "Section 1" tab is selected. Inside the window, there is a text input field containing the word "Preparation". To the right of this field are two buttons: "Ideas +" and "Ideas -". Below the input field is a large text area containing a paragraph of text: "Mr. Smith prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Smith clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn." Below the text area is a list of seven items, each with a checkbox and a text field. The first five items are checked, and their text fields contain the following descriptions: "Planned appropriate activities to fill available class time.", "Prepared sufficient instructional materials.", "Clear statement of instructional purpose.", "Established why lesson is important for students to learn.", and "Reviewed student work from previous period." The last two items are unchecked and their text fields are empty. At the bottom left of the window is a "Reset" button, and at the bottom right is a "Clear Entire Page" button. Below the window are five buttons: "Print / View Sample", "Save", "Cancel", "Settings", and "Search / Replace".

The illustrated text beginning with “Mr. Smith prepared ...” can be edited to display any language preferred by the user. To be most useful, this box should reflect the language expected to be used most frequently for this category. This text will be tailored or customized by the user as each observation summary or evaluation is completed.

A generic name like “Mr. Smith” should be used here. The **Search / Replace** function allows the user to insert the appropriate employee name when the actual observation summary or evaluation is prepared.

The paragraph text for every section can be changed if desired. Click the **SAVE** button after all changes are made. Changes saved will become the active preferences for all subsequent observations or evaluations.

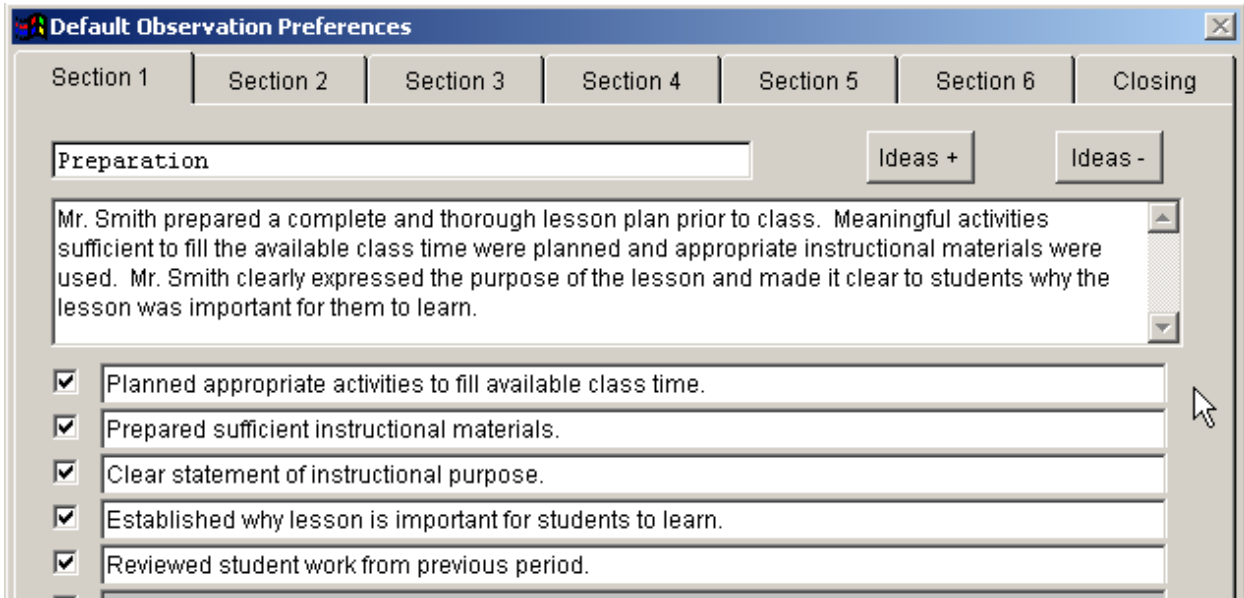
**Important Note:** Preferences used for earlier observations will remain unchanged.

## Clearing the Entire Preferences Page

The user may occasionally wish to start fresh with a clean page instead of editing the provided language. Click the **Clear Entire Page** button in the bottom right portion of the screen to achieve this function.

Clear Entire Page

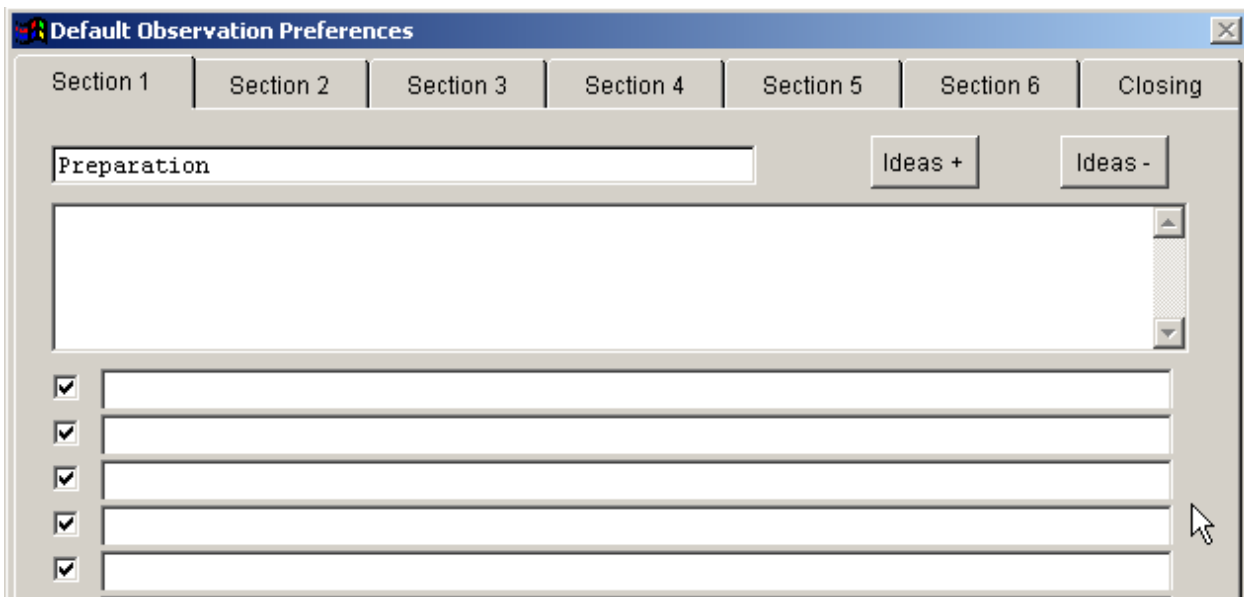
A fully populated page like the one below can be cleared with a single click.



The screenshot shows a window titled "Default Observation Preferences" with a tabbed interface. The "Preparation" tab is selected. The form contains a text area with the following text: "Mr. Smith prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Smith clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn." Below the text area are five checklist items, all of which are checked:

- Planned appropriate activities to fill available class time.
- Prepared sufficient instructional materials.
- Clear statement of instructional purpose.
- Established why lesson is important for students to learn.
- Reviewed student work from previous period.

The effect of clicking the **Clear Entire Page** button  is shown below.



The screenshot shows the same "Default Observation Preferences" window, but the form is now cleared. The text area is empty, and the checklist items are still checked but their text is blank:

- 
- 
- 
- 
- 

This convenient feature can be used either (1) while entering and editing preferences or (2) while doing a single observation summary or evaluation.

## Editing Quality Indicators

Select **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar. The default observation preferences screen will appear.

Default Observation Preferences

Section 1 | Section 2 | Section 3 | Section 4 | Section 5 | Section 6 | Closing

Preparation Ideas + Ideas -

Mr. Smith prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Smith clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn.

- Planned appropriate activities to fill available class time.
- Prepared sufficient instructional materials.
- Clear statement of instructional purpose.
- Established why lesson is important for students to learn.
- Reviewed student work from previous period.
- 
- 
- 
- 
- 

Reset Clear Entire Page

Print / View Sample Save Cancel Settings Search / Replace

The items preceded by check marks are quality indicators for this category. They can be edited to display any language preferred by the user and should reflect behaviors expected in most employees. This text may be tailored or customized by the user as each observation summary or evaluation is completed.

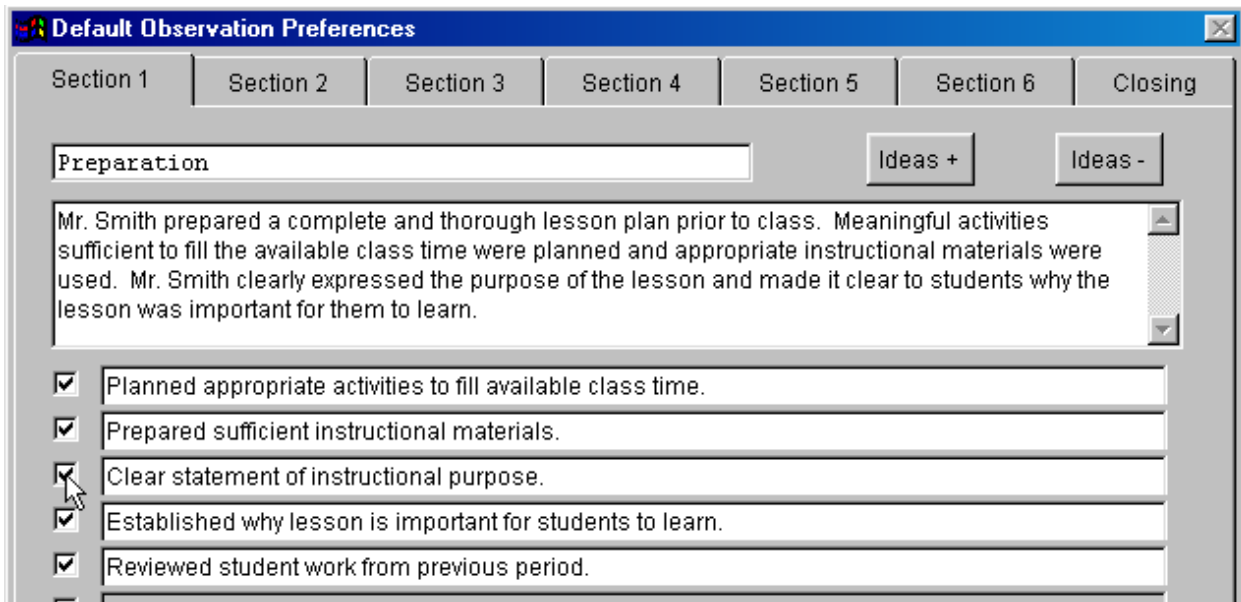
Check marks by quality indicators make them active. Those without a check mark remain available if desired and may be activated when an observation summary or evaluation is completed.

The text for quality indicators can be changed in every section if desired. Click the **SAVE** button after all changes are made. Changes saved will become the active preferences for all subsequent observations or evaluations.

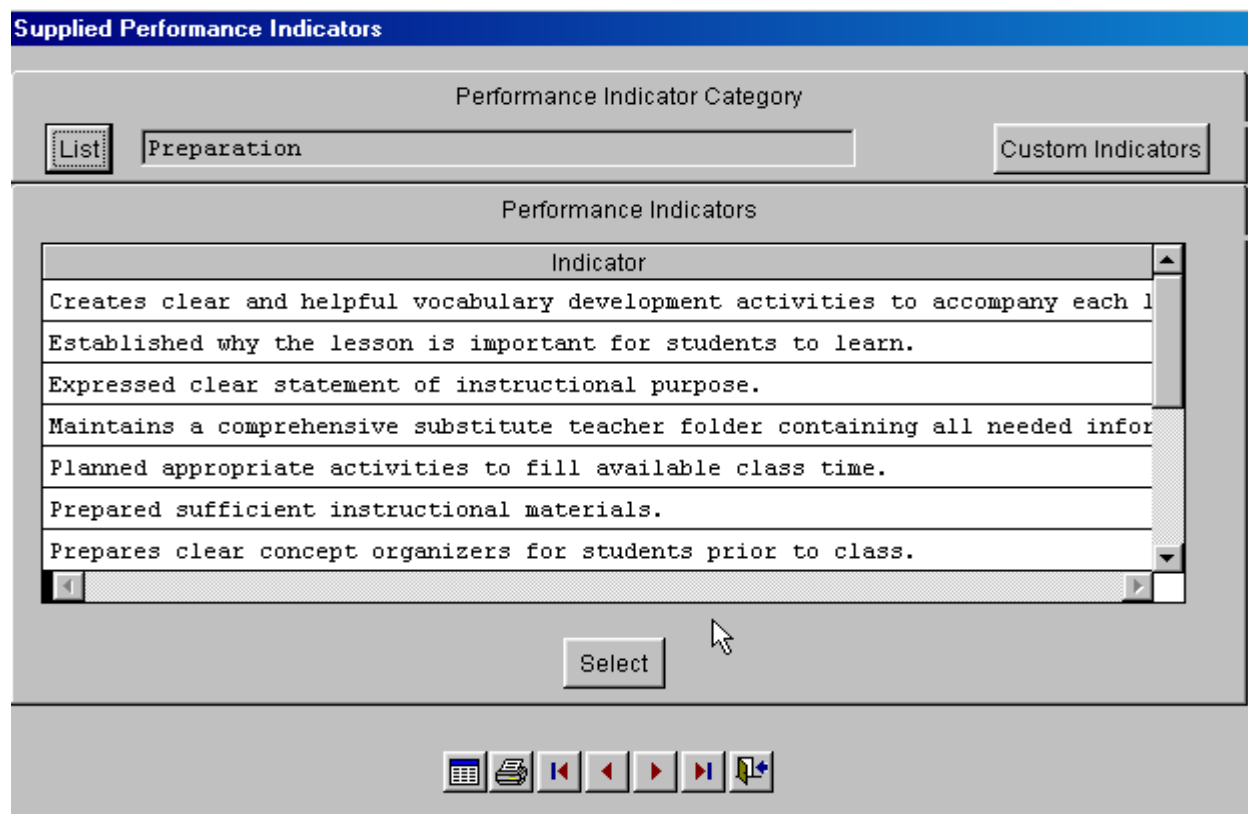
**Important Note:** Preferences used for earlier observations will remain unchanged.

## Extending and Amplifying Preferences

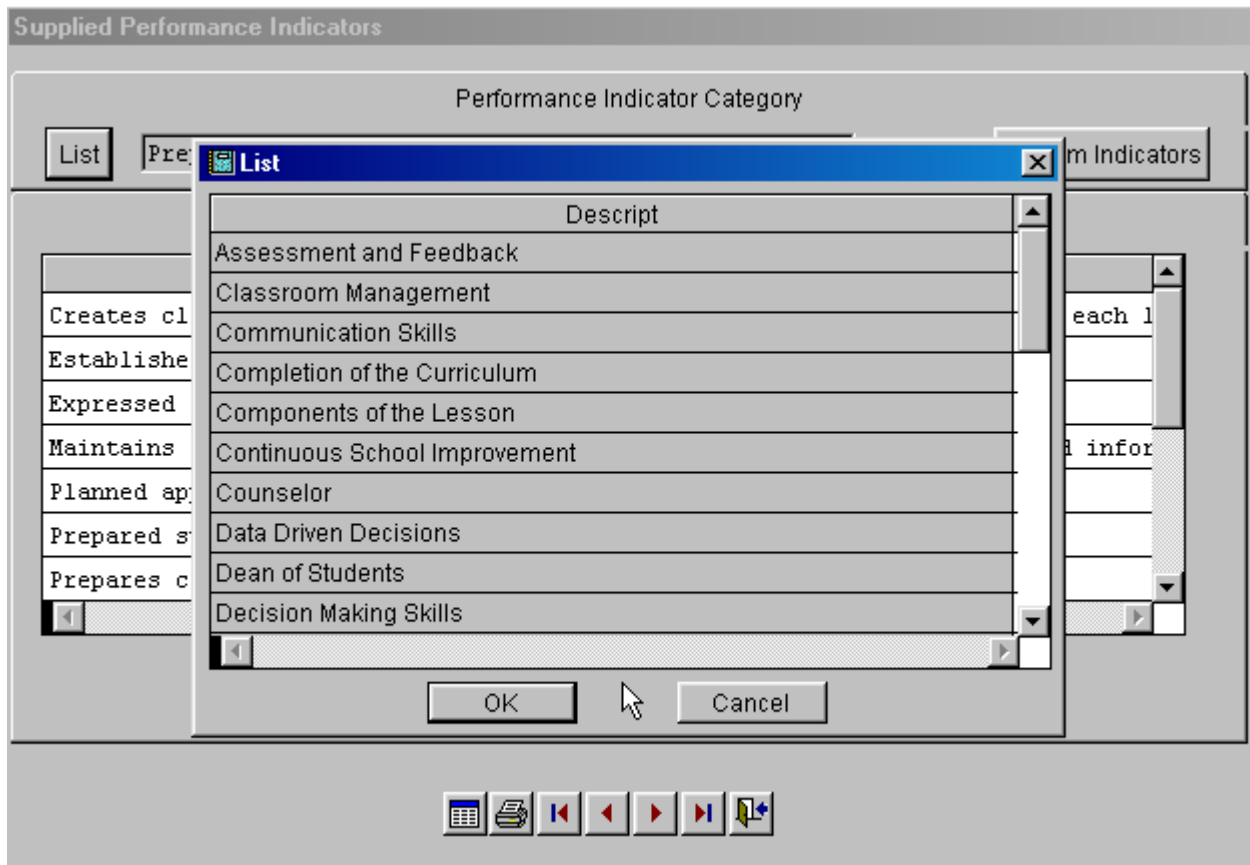
An extensive array of additional performance descriptors is provided in the performance indicator databases. These databases can be accessed by **right-clicking** while the cursor is placed over a checkbox as shown in the illustration below.



**Right-clicking** while the cursor is on a checkbox will reveal the dialogue shown below.



The user may click the **LIST** button to reveal additional categories of performance indicators as shown below.



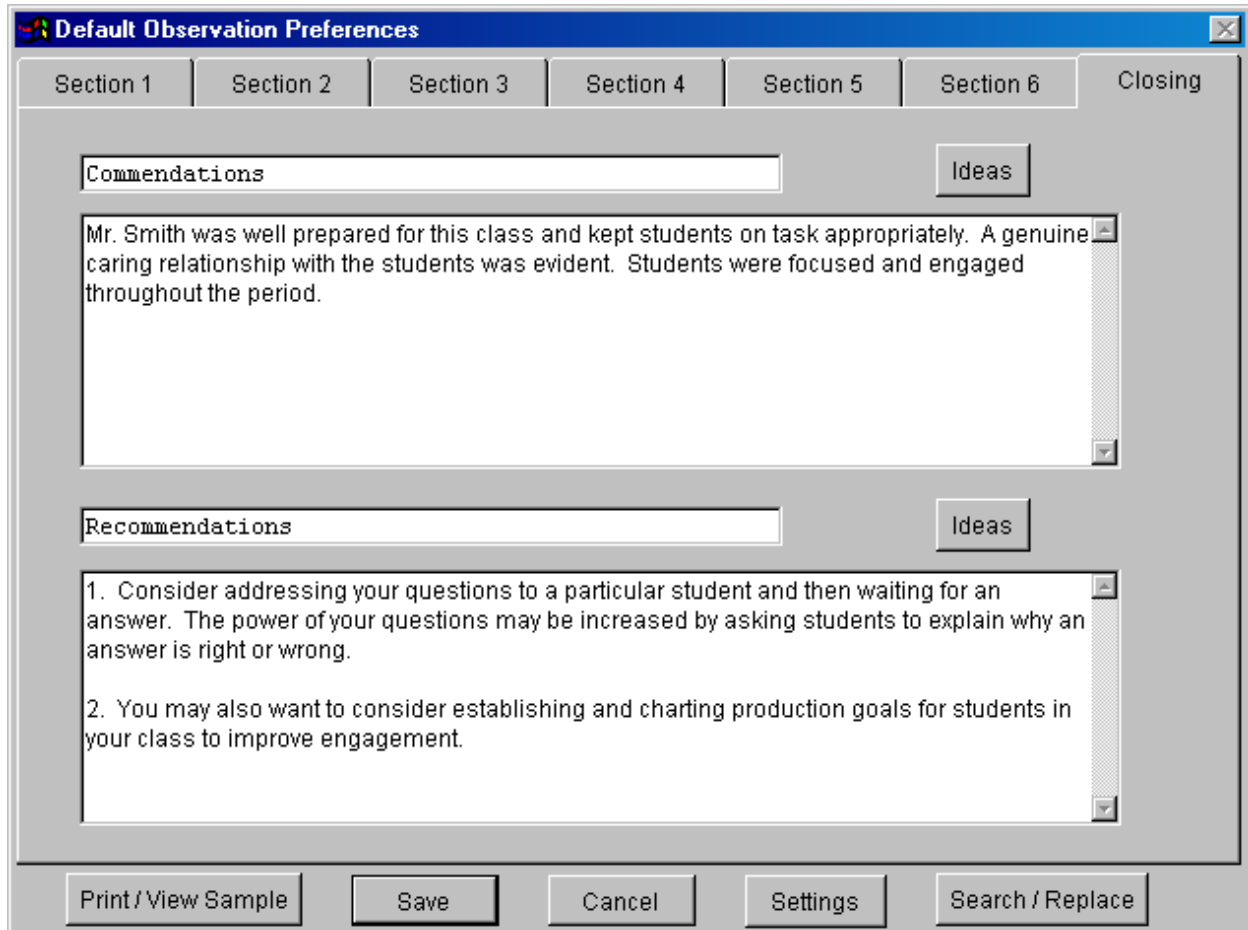
The scroll bar can be a convenient method of revealing and moving to additional categories of performance indicators. Users may additionally type the first few letters of the category title to jump to the category. For example, the **Safety** category is not visible in the illustration above. The user could, however, type "s" or "saf" to jump to that category.

Double clicking the category desired will reveal the associated performance indicators.

Double clicking the specific performance indicator desired will insert that text into the preferences for editing, if desired, and for future use.

## Editing the Closing Section

Select **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar. The default observation preferences screen will appear.



The section titles “Commendations” and “Recommendations” can be edited to display the user’s preferences. For example, “Recommendations” might become “Job Targets.” Additionally, the text under each of these titles can be edited to reflect the user’s thoughts about each individual employee. These sections can contain several paragraphs if desired.

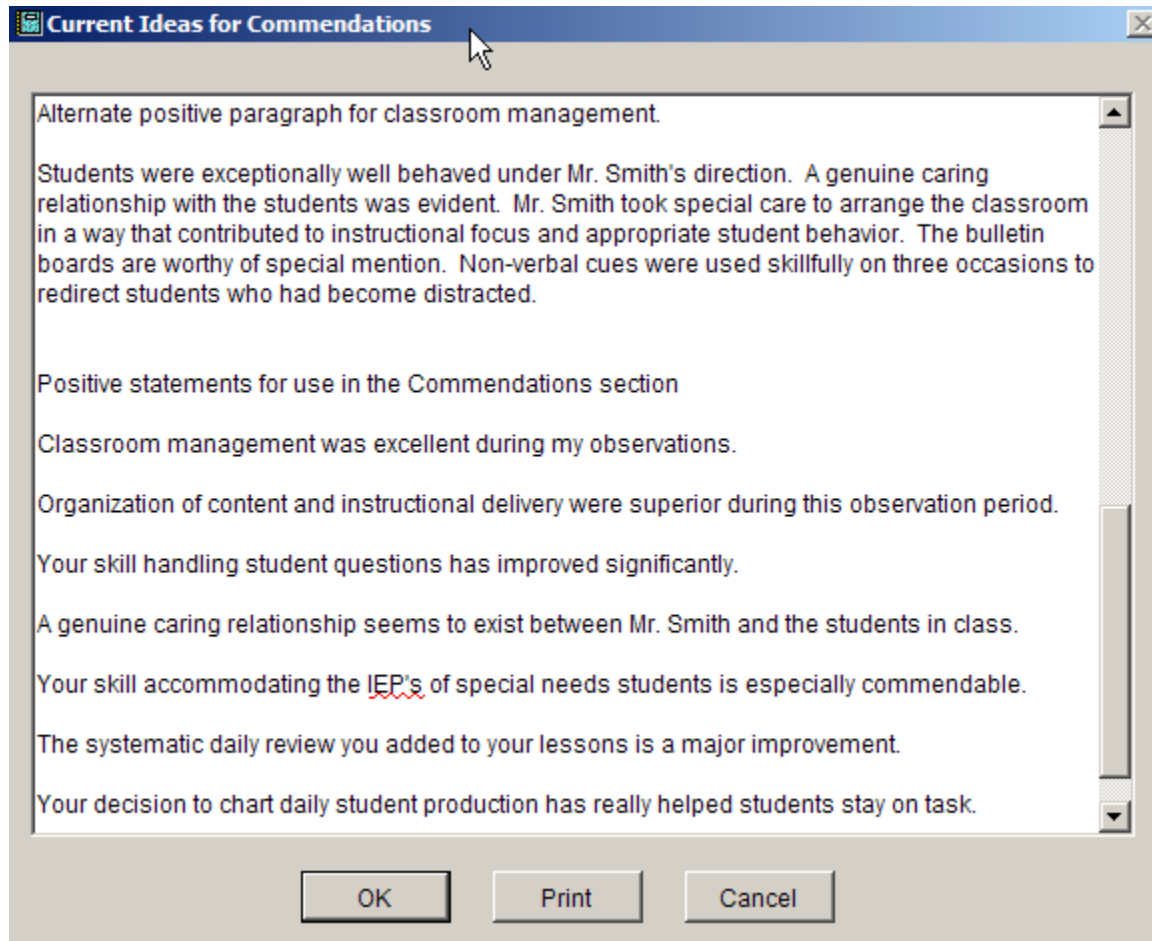
Each closing section has an IDEAS button that can hold thoughts frequently used by the evaluator. As with all other parts of *The Administrative Observer*, this text can be customized to display the user’s preferences.

Click the **SAVE** button after all changes are made. Changes saved will become the active preferences for all subsequent observations or evaluations.

**Important Note:** Preferences used for earlier observations will remain unchanged.

## IDEAS

The CLOSING sections each have a companion **IDEAS** button which reveals a store house of useful comments when clicked.



The text in this section can be edited reflect the user's preferences. Click **OK** when the comments reflect ideas you might want to use in your closing sections.

Directions for using this text in your closing sections will be covered in another part of this manual.

Click the **SAVE** button after all changes are made. Changes saved will become the active preferences for all subsequent observations or evaluations.

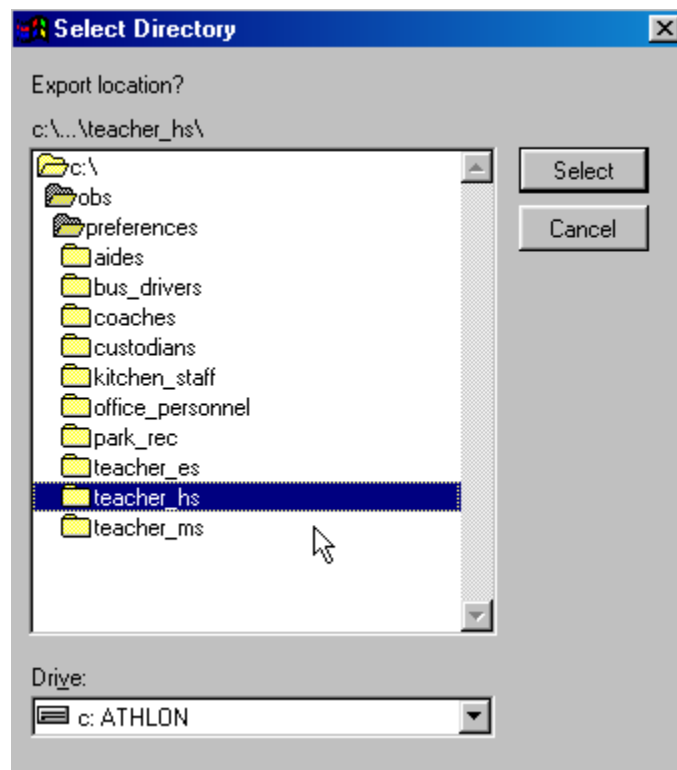
**Important Note:** Preferences used for earlier observations will remain unchanged.

## Exporting and Importing Preferences

The user should export preferences each time an important change is made to the default preferences. The purposes of exporting are (1) to provide a safety copy of the preferences if for any reason they are over-written accidentally, and (2) to provide different users the option of sharing preferences throughout an organization if desired.

### Exporting Preferences

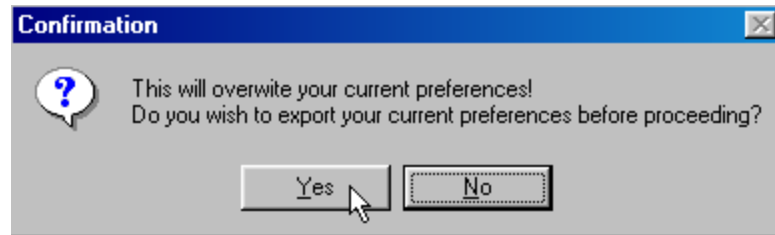
Select **Preferences | Export Preferences** from the menu bar. A dialogue will appear asking the user for a destination directory.



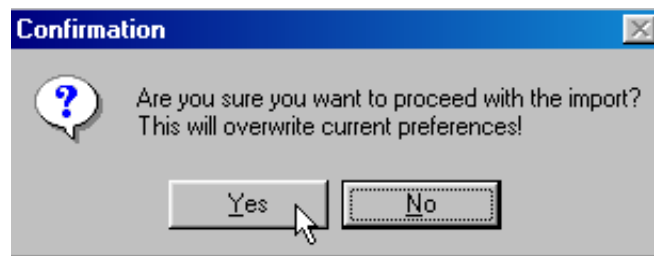
In the example above, the user has prepared preferences for a high school teacher and will export those preferences to C:\OBS\PREFERENCES\TEACHER\_HS. The user should click the SELECT button after highlighting the destination directory. Any destination drive or directory can be selected using this dialogue.

## Importing Preferences

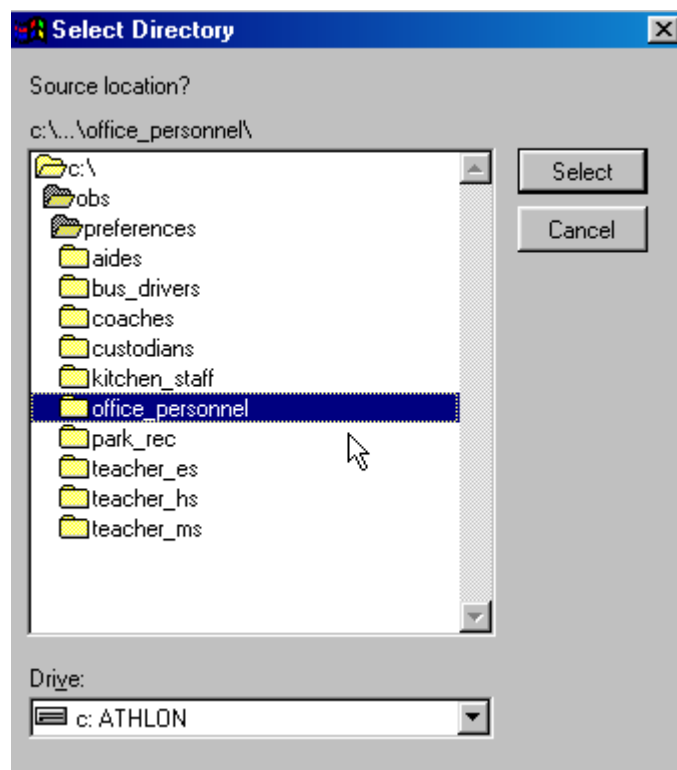
Select **Preferences | Import Preferences** from the menu bar. A cautionary dialogue will appear asking if the user would like to export current preferences before proceeding.



Users will be taken through the export process if the **YES** button is clicked. Most users, will choose the **NO** button at this point. Another cautionary dialogue will appear.

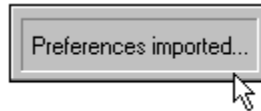


Click **YES** to proceed. The source of the preferences will be requested.



The user should click **SELECT** when the appropriate drive and directory are highlighted. In the example shown, the user intends to import previously customized and exported secretarial preferences for use with a planned evaluation.

The import will be completed after the user clicks the **SELECT** button. An indication that the import was successful will appear in the upper right-hand portion of the screen.



Following import, all new observations or evaluations will be based on the imported preferences.

If desired, the user can select **PREFERENCES | EDIT OBSERVATION PREFERENCES** from the menu bar to edit the imported preferences before use.

Continuing with the example above, the user could change to a different job category after finishing the secretarial evaluation by

- \* selecting **PREFERENCES | SELECT DEFAULT PREFERENCES** to use preferences supplied by the publisher

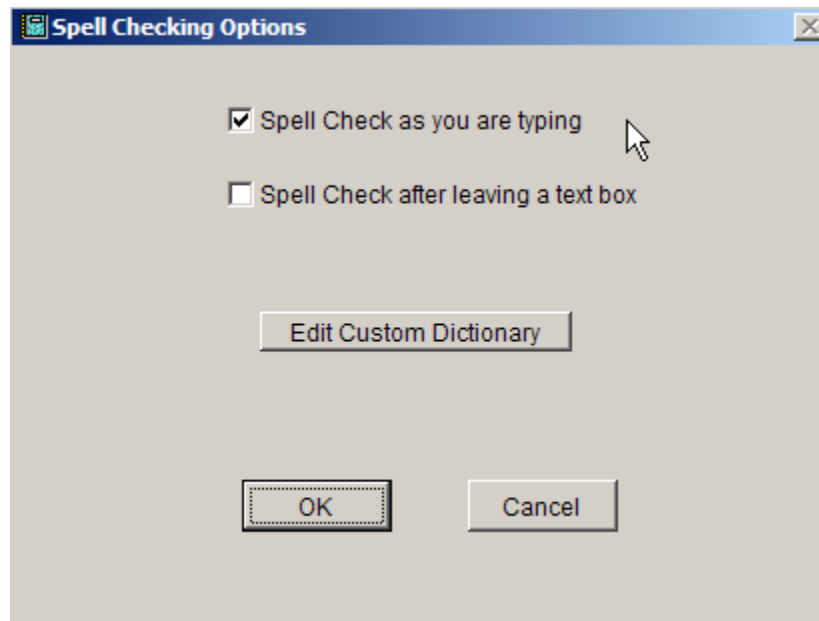
or

- \* selecting **PREFERENCES | IMPORT PREFERENCES** to use customized user preferences previously exported.

## Spellcheck

A powerful spellcheck ability featuring a 110,000 word dictionary and allowing the user to supplement with a custom dictionary protects the user from the embarrassment of misspellings and bad typing. The spellcheck feature should be configured to reflect user preferences prior to use.

Select **Setup | Spellcheck** to reveal the dialogue shown below.

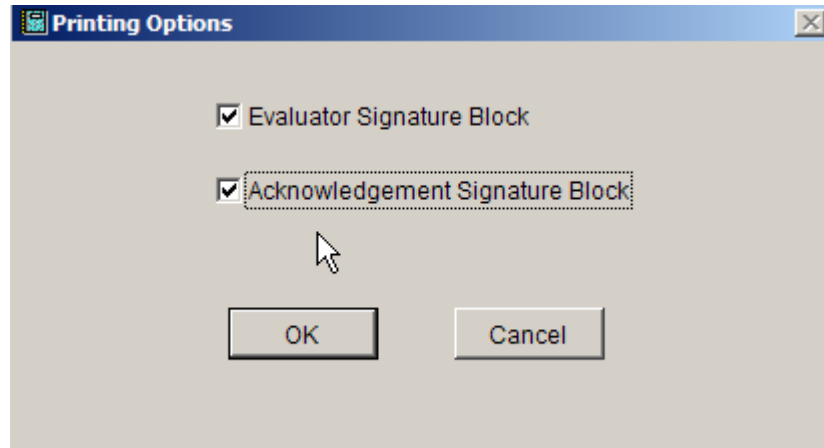


While either option is acceptable, “check spelling as you are typing” is the recommended option. Do not check both boxes or leave both boxes unchecked.

The “red squiggle” is the key to using spellcheck. Click on any word underlined by a “red squiggle” and right click. Select from recommended spellings, add to your custom dictionary, or choose to ignore the apparent misspelling.

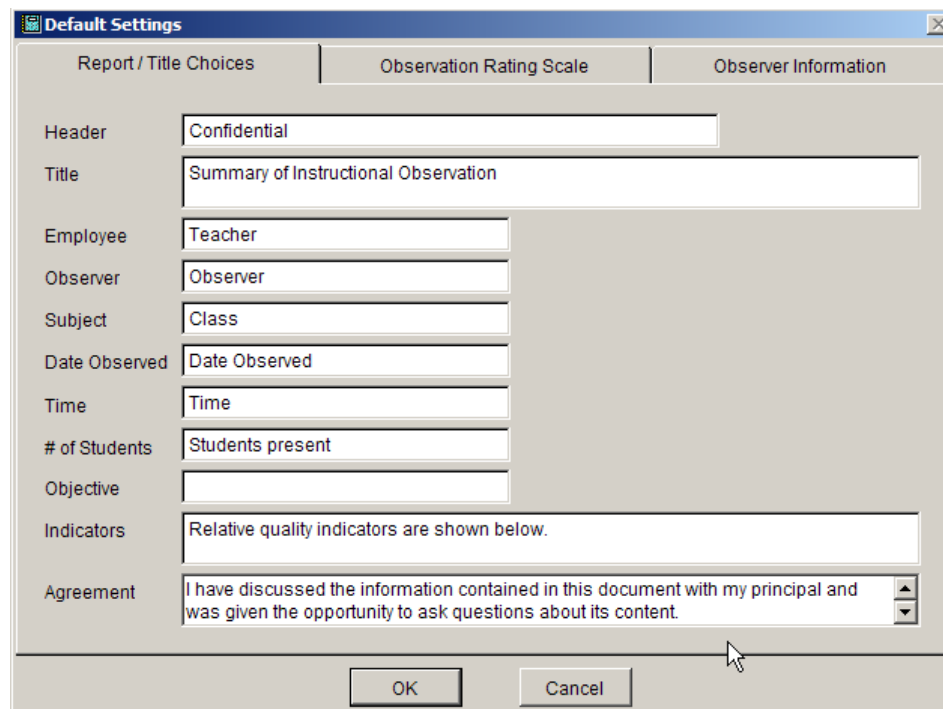
## Configuring the Signature Block

Each document created by **The Administrative Observer** can have a signature area allowing the evaluator, the person observed, or both to acknowledge the contents of the document. By default, both portions of the signature block are turned on.



The user can customize this feature by selecting **SETUP | PRINTING OPTIONS** and checking the appropriate boxes in the dialogue.

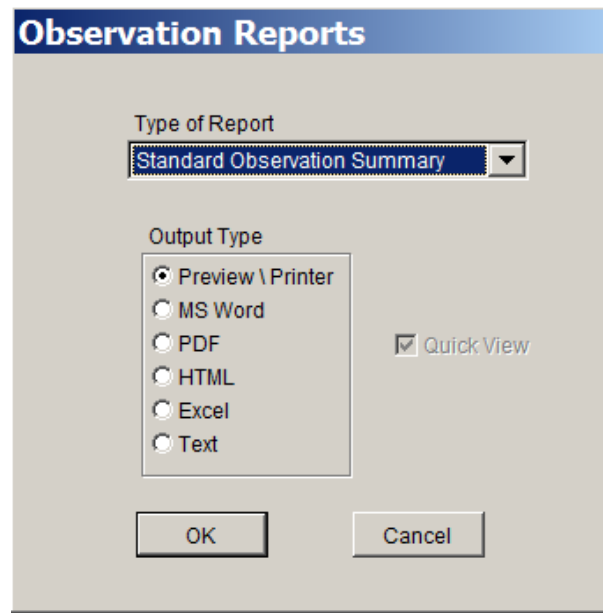
Users who turn off either signature option should review the contents of the **SETTINGS** established for the preferences or template being used.



The “agreement” box illustrated above should probably be left blank when the acknowledgement signature block is turned off.

## Expressing Completed Documents in Alternate Formats

Documents are normally previewed onscreen or sent to paper in a printer. The user may alternatively export documents to a variety of formats shown below by (1) selecting PREVIEW / PRINT within the **Observation File Manager** or (2) selecting **Reports** on the main menu bar. The following dialogue will appear.



Reports expressed in MS Word format (DOC) can be viewed, edited, and printed using MS Word 2000 or better.

Reports expressed in PDF format can be viewed using the readily available Adobe Acrobat Reader or Adobe Acrobat. The PDF format is not easily edited and is therefore excellent for sending a performance review to an employee as an e-mail attachment.

Reports expressed in HTML format can be viewed using a web browser such as Internet Explorer. This can be useful when posting to private or secure web locations.

Reports expressed in MS Excel format (XLS) can be viewed, edited, and printed using MS Excel 2000 or better.

Reports expressed in TEXT format can be viewed, edited, and printed using any text editor or word processor.

## Supportive Companion Documents

The Pre-Observation Guide and the Observer's Checklist are two documents that should be printed for use prior to conducting an observation or evaluation.

### The Pre-Observation Guide

Select **Reports | Pre-Observation Guide** from the main program menu bar. This document should be printed and given to the employee you plan to observe in advance of the visit. The Pre-Observation Guide expresses the categories and quality indicators you have chosen as your current preferences. Using the Pre-Observation Guide should help the employee understand the behaviors considered important by the person conducting the observation or evaluation.

See Appendix 3 for an illustration of the Pre-Observation Guide.

### The Observer's Checklist

Select **Reports | Observer's Checklist** from the main program menu bar. This document should be printed and used when the observation is conducted. The Observer's Checklist expresses the categories and quality indicators active in the current preferences. This document provides the observer a form for taking notes in a structured manner for easy data input.

See Appendix 3 for an illustration of the Observer's Checklist.

### The Performance Indicator Databases

The Supplied and Custom Performance Indicator databases may be printed for easy reference. Select **REPORTS | PERFORMANCE INDICATOR DATABASES**, select the Supplied Performance Indicator database or the Custom Performance Indicator database, then click **OK** to view or print.

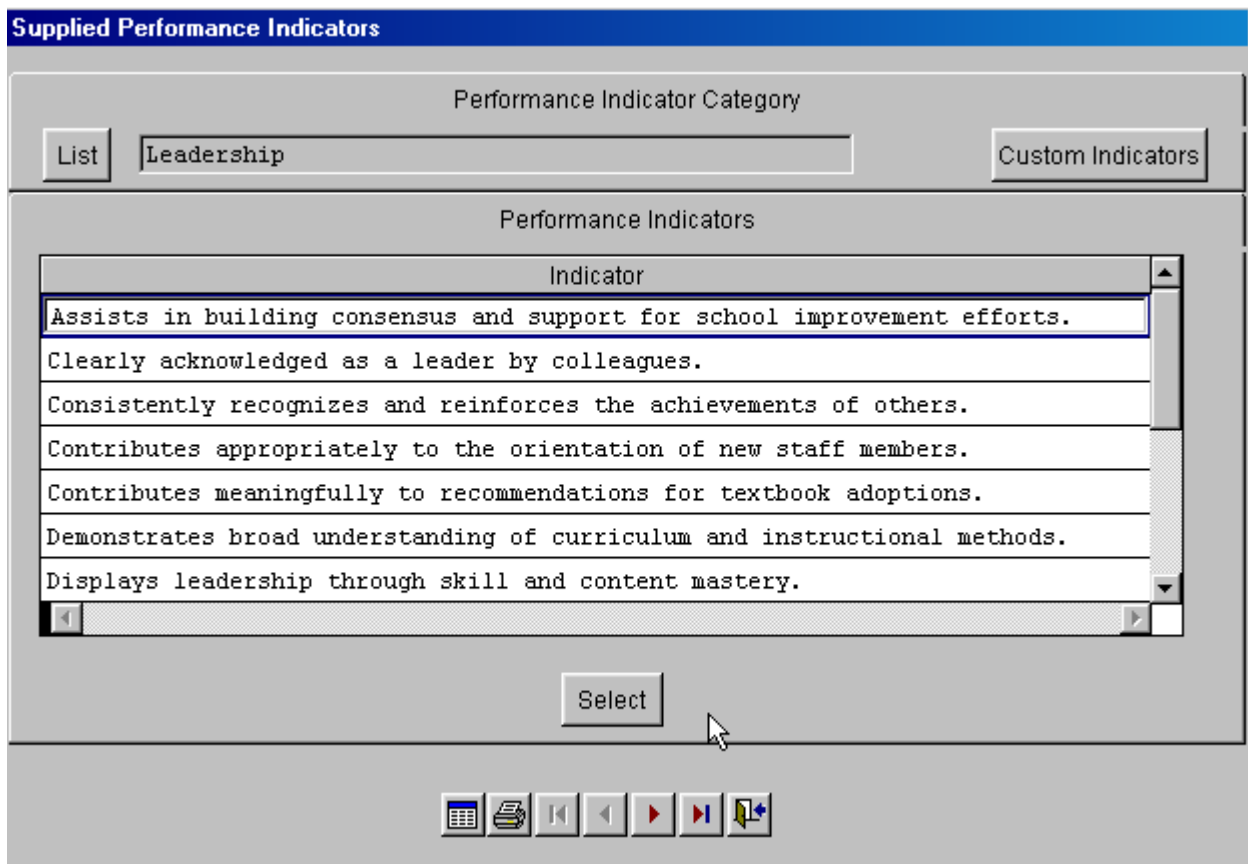
## Maintaining the Quality Indicator databases

The Administrative Observer includes two databases of performance indicators to supplement and amplify user preferences. These databases are designated Supplied Performance Indicators and Custom Performance Indicators.

### Accessing the Performance Indicator Databases

From time to time the user may want to visit [www.pes-sports.com](http://www.pes-sports.com) to download the most recent database of supplied performance indicators.

Select **Performance Indicators | Supplied Performance Indicators** to view or print this database. The following dialogue will appear.



Click the **LIST** button to view or select other categories of performance indicators.

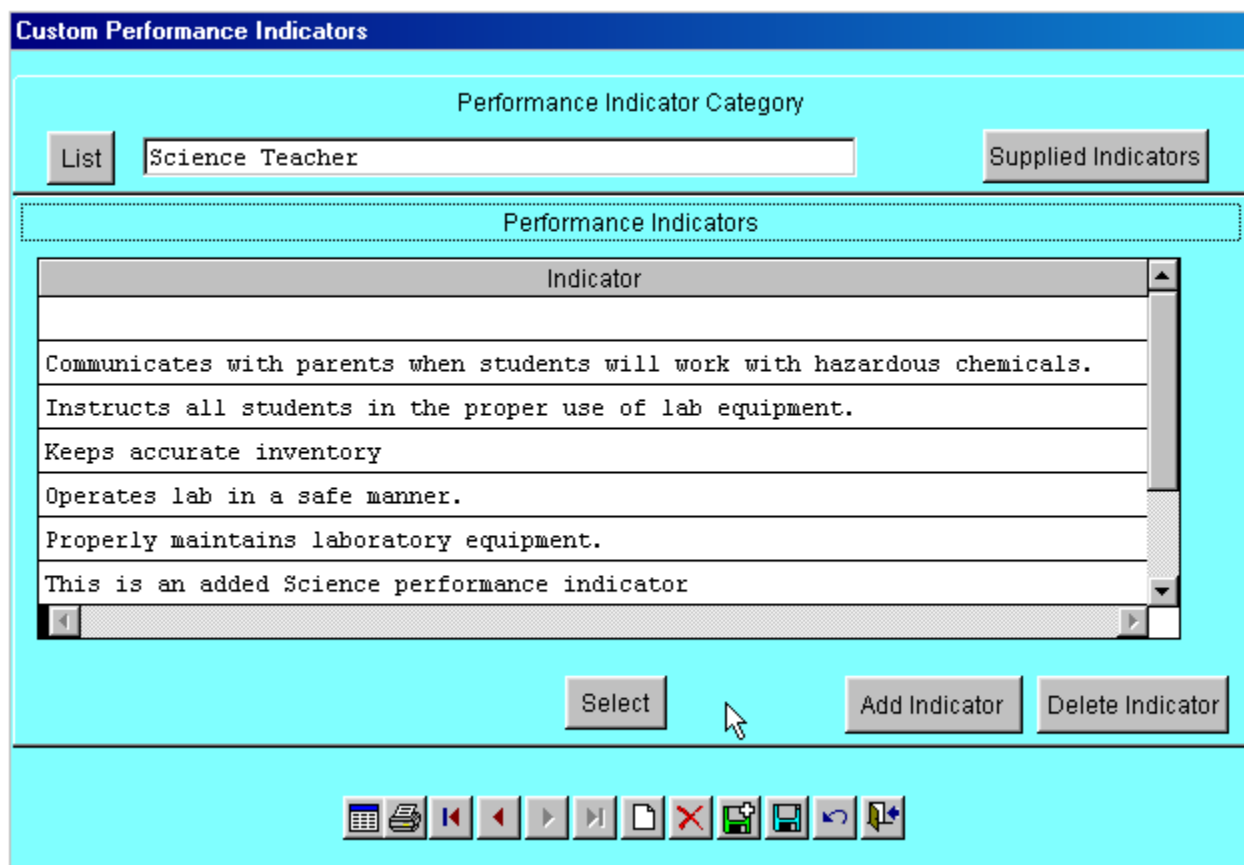
Browse the supplied performance indicators using the navigation   icons.

Print the supplied performance indicators by clicking the **PRINT**  icon.

Exit the database of supplied performance indicators by clicking the **EXIT**  icon.


The supplied performance indicators can be used but not changed. The database of custom performance indicators, however, allows the user to add and customize.


Select **Performance Indicators | Custom Performance Indicators** to view or print this database. The following dialogue will appear in bright turquoise to distinguish custom indicators from supplied indicators.



Click the **LIST** button to view other categories of performance indicators in the custom database.

Click the **SUPPLIED INDICATORS** button to toggle back and forth between the supplied and the custom performance indicator database.

Click the **Add Indicator** button to add a new performance indicator to the current category of indicators. To protect the user from accidental additions or changes, the operation will not be completed until the **SAVE**  icon is clicked.

Click the **Delete Indicator** button to discard the current performance indicator. The operation will not be completed until the **SAVE**  icon is clicked.

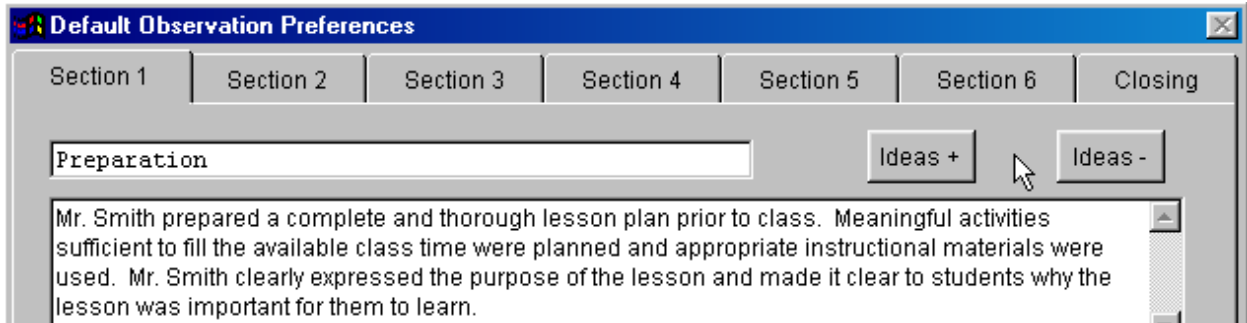
Click within an existing indicator to change its text to your liking.

Click the **NEW CATEGORY** icon  to make a new category of performance indicators.

Click the **SAVE** icon  to save your additions or changes.

## Maintaining IDEAS+ and IDEAS-

Two IDEAS buttons allow the user to insert frequently used text without constant retyping. Those buttons appear when the user is (1) editing preferences or (2) creating an evaluation document.



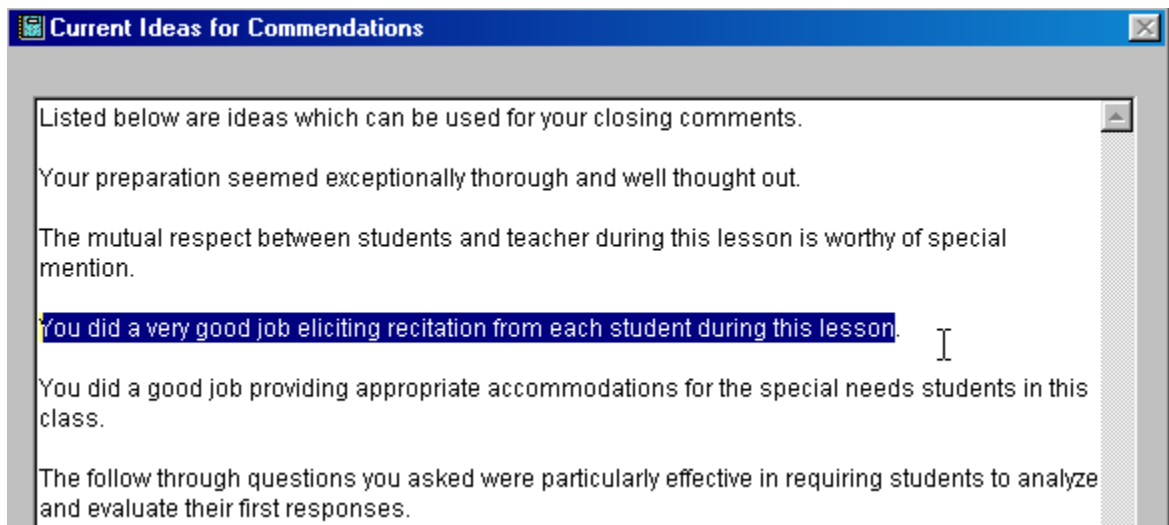
Clicking either button will reveal text the user might wish to insert on a relatively frequent basis without the need for re-typing.

Clicking the **IDEAS+** button reveals a collection of somewhat positive statements to reinforce desired behaviors.

Clicking the **IDEAS-** button reveals a collection of statements meant to address behaviors or characteristics that need improvement.

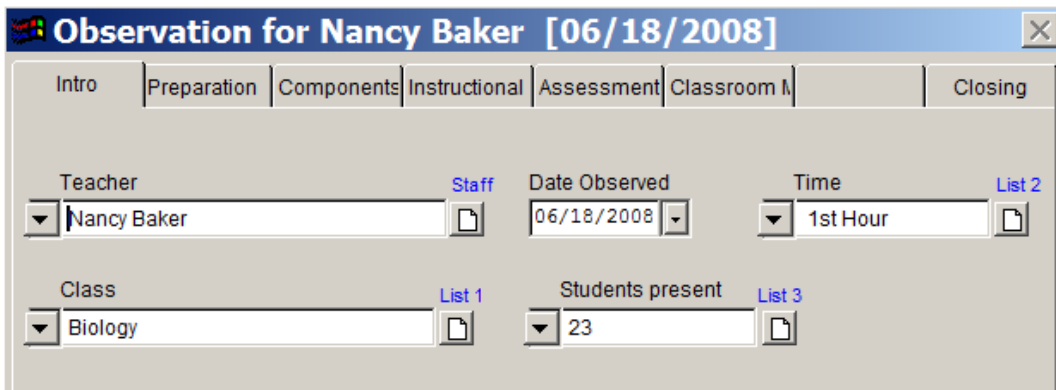
Click **PREFERENCES | EDIT PREFERENCES** to establish the text associated with each **IDEAS** button. Doing so will reveal a dialogue similar to the one pictured above.


Clicking one of the **IDEAS** buttons will reveal a dialogue box into which the user can insert the text desired for future use.

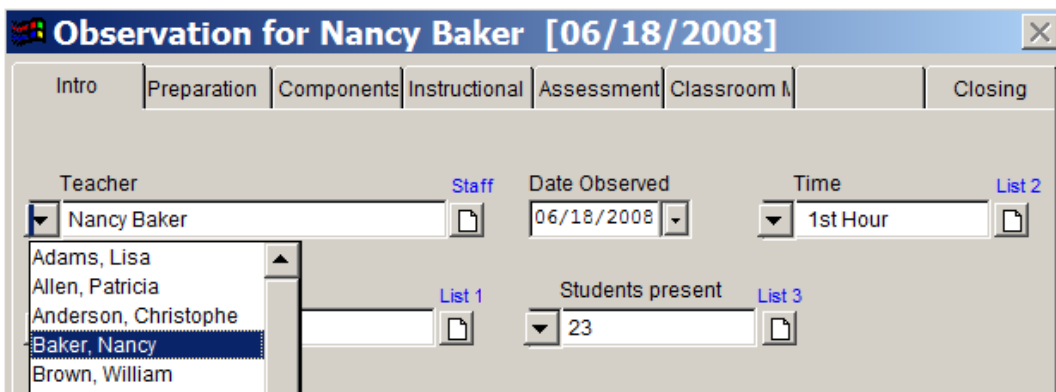


## Maintaining and Using Pop-up Lists


Pop-up lists can increase convenience and consistency when entering employee names and other observation data. Pop-up lists are available for this purpose on the first tab of each observation record. This tab bears the title “Intro” as shown below.



Click the small downward pointing icon  to access the available list of input options. Highlight and select the item desired.



The caption of each data input box can be changed via the **SETTINGS** options as discussed elsewhere in this manual. The box labeled “Teacher” above, for example, could be entitled “Employee.”

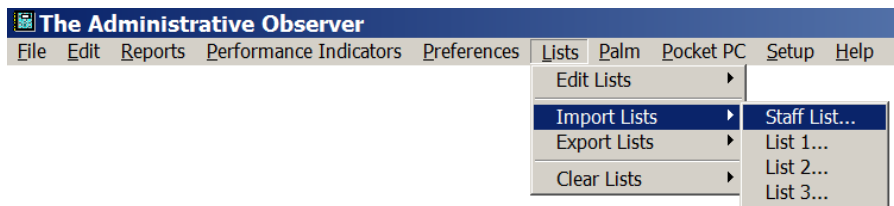
Regardless of the caption, the “Teacher” input area is associated with the STAFF list . In similar fashion, the “TIME” area above is associated with the content of LIST 2.

It is important to note that input areas can be captioned according to **any** data the observer might wish to collect. The content of the corresponding LIST would be populated with an appropriate list of input options.

**The Administrative Observer** provides several useful functions related to the creation and use of pop-up lists.

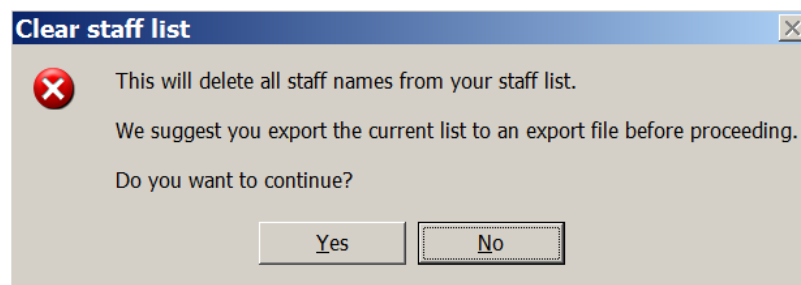
- Establish or populate the list
- Edit or modify the list from time to time.
- Backup the lists to guard against computer malfunction.
- Share the lists with colleagues.
- Download to handheld devices

The main menu selection allowing these functions is shown below.

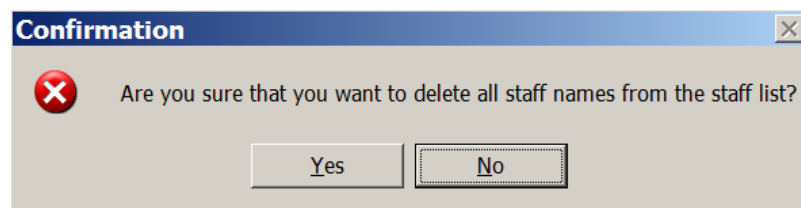


### Establishing or Populating a pop-up list

The Administrative Observer ships with its lists populated for illustration purposes. The illustration content should be cleared to create lists appropriate to your school. Select **LISTS | CLEAR LISTS | STAFF LIST**. A cautionary dialogue will appear.



To exit and export the current list for safety, click **NO**. A new user would have no need to preserve the illustrative staff list and would simply click **YES**. A second cautionary dialogue will appear.



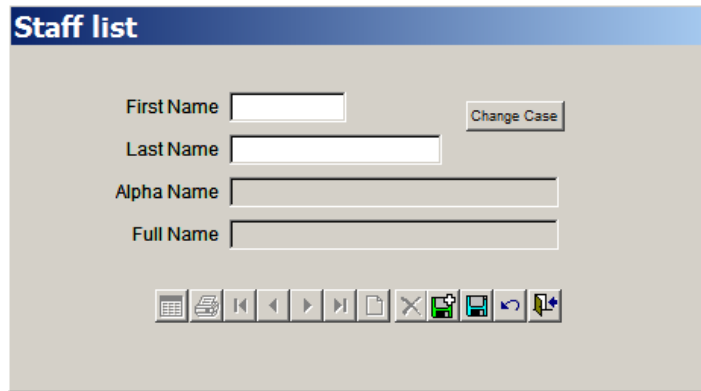
Click **YES** to complete the task. The STAFF list will now be empty and ready to accept new content.

A locally meaningful list of names can be established several ways.

- Direct typing input.
- Importing from a file exported by a colleague who entered the names.
- Importing from a file created by the district IT department.

### Direct List Input

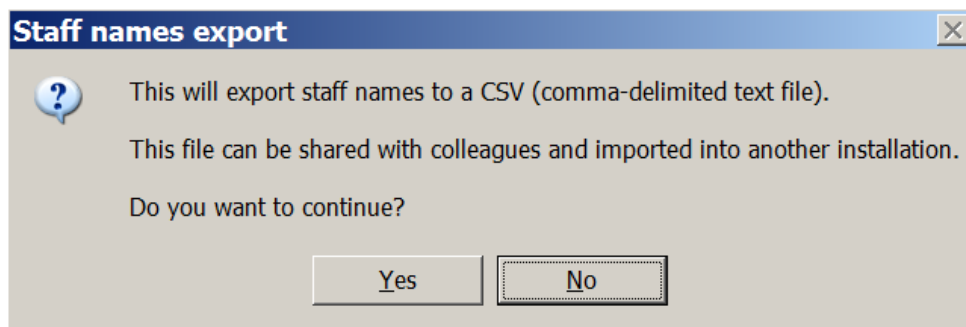
To create a STAFF list via typing, select **LISTS | EDIT LISTS | STAFF LISTS**. You will be placed in ADD mode.



Enter each name and click the **SAVE +** icon . Your entry will be saved and you will be prompted for your next entry.

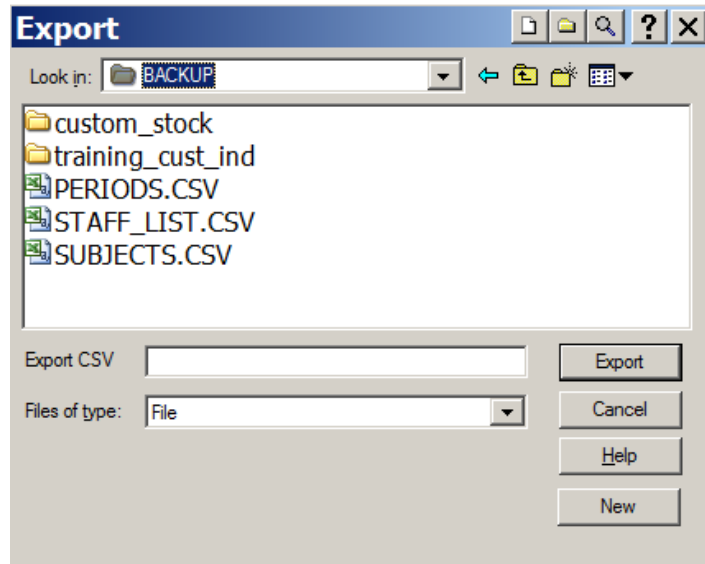
After your final entry, click the **SAVE** icon  followed by the **EXIT** icon  to leave add/edit mode. Your staff list will now be ready for use.

Lists should be exported to a safe, known location after initial creation or periodic editing. Click **LISTS | EXPORT LISTS | STAFF LISTS**. A cautionary dialogue will appear.



Click YES to continue.

An **EXPORT** dialogue will appear. Use the “Look in:” feature to navigate to the C:\OBS\BACKUP folder or other desired location.

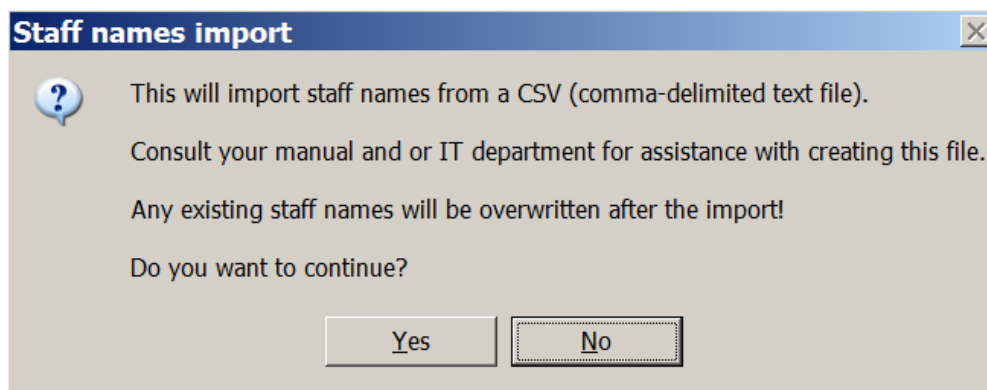


Enter a meaningful name for the file to be exported (such as STAFF\_LIST) and click EXPORT.

### Importing a List

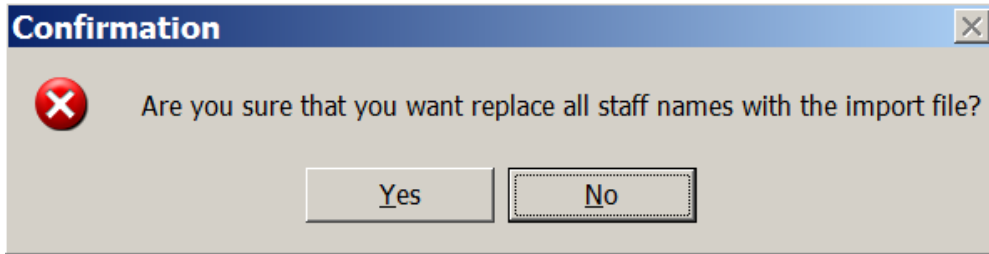
A list that has been exported can be imported at a later date if restoration is needed. More commonly, an exported list can be shared with a colleague using the import function. For this to happen, the exported list must be in a known, accessible location such as a network folder, a USB drive, etc. Consult your IT department for guidance in this area.

To import an existing file, select **LISTS | IMPORT LISTS | STAFF LISTS**. A cautionary dialogue will appear.

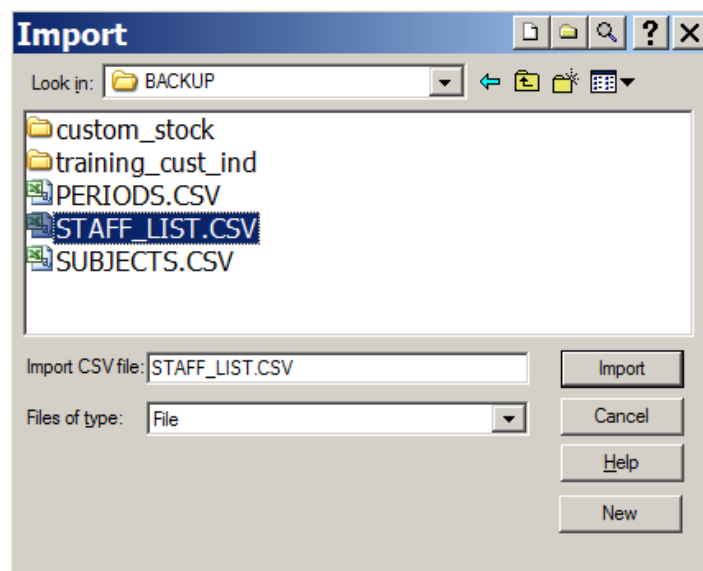


Click YES to continue.

A second cautionary dialogue will appear. Click YES when ready to continue.



An **IMPORT** dialogue will appear. Use the "Look in:" feature to navigate to the location of the desired file. Select that file and click the IMPORT button.



### Creating an IMPORT LIST from Other Sources

A district that maintains employee or other data in a district database may be able to create an import file. Output in the form of a comma delimited text file or CSV file is required for import into **The Administrative Observer**. The formats are illustrated below. Notice the required header line. Consult your district IT staff for assistance.

```
1 |firstname,lastname
2 |"Bill","Craig"
3 |"John","Johnson"
4 |"Robert","Williams"
5 |"Michael","Jones"
6 |"William","Brown"
7 |"David","Davis"
8 |"Richard","Miller"
```

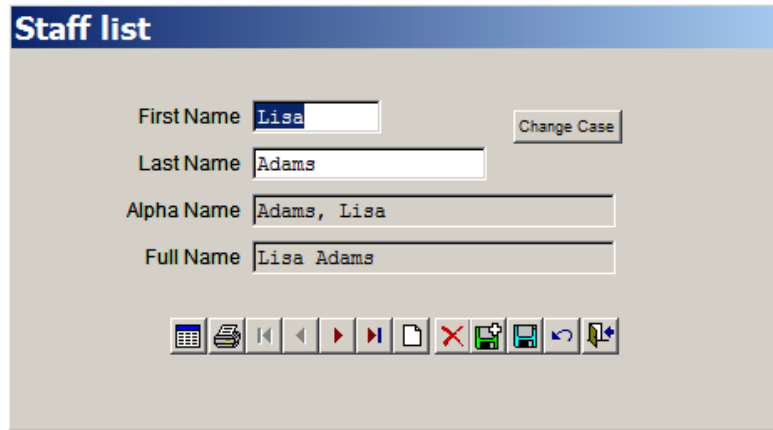
Comma Delimited Text File

|   | A         | B        |
|---|-----------|----------|
| 1 | firstname | lastname |
| 2 | Bill      | Craig    |
| 3 | John      | Johnson  |
| 4 | Robert    | Williams |
| 5 | Michael   | Jones    |
| 6 | William   | Brown    |
| 7 | David     | Davis    |
| 8 | Richard   | Miller   |









CSV file created using MS Excel

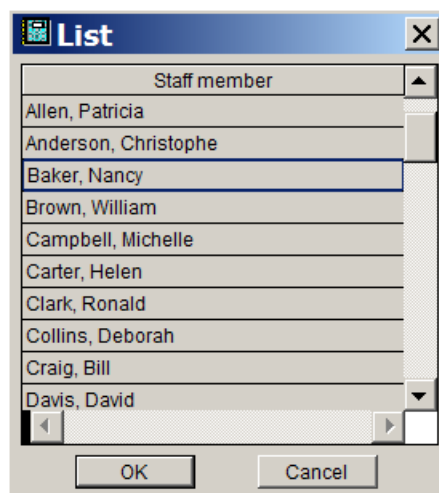
## Revising an Existing Staff List

To edit an existing list, select **LISTS | EDIT LISTS | STAFF LISTS**. The following dialogue will appear.



Several adjustments can be made from this dialogue.

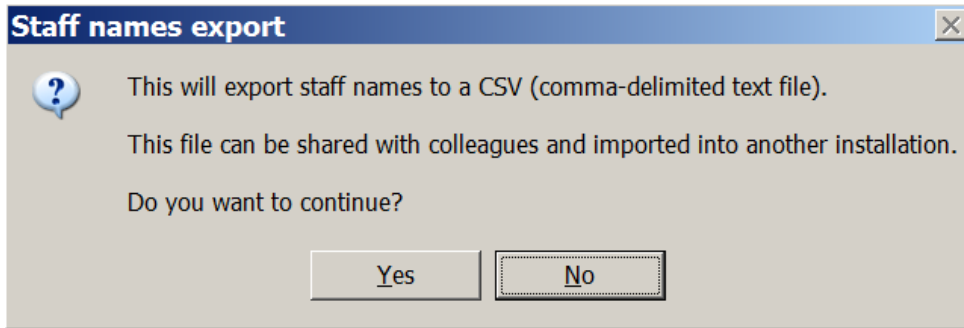
- **To change** the name shown, simply re-type. Click the **SAVE** icon  followed by the **EXIT** icon  when finished.
- **To delete** a name from the list, use the navigation arrows  to move to that name, then click the **DELETE** icon .
- **To add** a new name to the list, click the **NEW** icon , then enter the employee name. When finished, click the **SAVE** icon  followed by the **EXIT** icon .
- **To navigate quickly** to a name already on the list, click the **TABLE** icon . A table will appear as below. Either double-click the name or highlight it and select **OK** to move to that specific record. Modify as desired and **EXIT** as explained above.



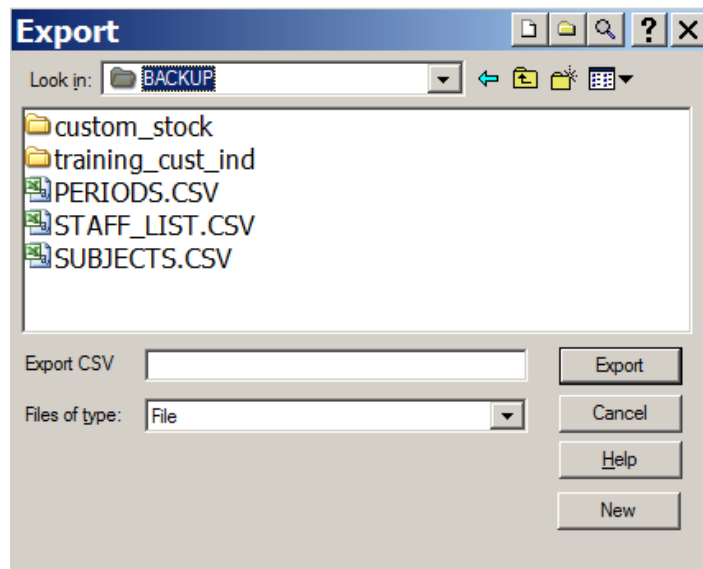
| Staff member         |
|----------------------|
| Allen, Patricia      |
| Anderson, Christophe |
| Baker, Nancy         |
| Brown, William       |
| Campbell, Michelle   |
| Carter, Helen        |
| Clark, Ronald        |
| Collins, Deborah     |
| Craig, Bill          |
| Davis, David         |

## Backing Up Lists Following Creation or Editing

Lists should be exported to a safe, known location after initial creation or periodic editing. Click **LISTS | EXPORT LISTS | STAFF LISTS**. A cautionary dialogue will appear. Click YES to continue.



An **EXPORT** dialogue will appear. Use the "Look in:" feature to navigate to the C:\OBS\BACKUP folder or other desired location.



Enter a meaningful name for the file to be exported (such as STAFF\_LIST) and click **EXPORT**.

## Sharing Lists with Colleagues


It is often desirable to share a list with a colleague. The **EXPORT** and **IMPORT** features make this easy. See the discussion of those features above. It is important for the list to be shared to exist in a known location. This could be a network location, a USB drive, etc. Consult your IT department for guidance if needed.


## Using LISTS for Data Entry


Once created, the pop-up list feature allows convenient and consistent data entry. Several notes regarding their use appear below.

- The content of each list will be universally available. This means that a single staff list can contain the names of teachers and support staff. All the names will be available, regardless of the active preferences or the template selected for use.
- The presence of a pop-up list does not require its use. A name can be entered directly by typing if it is not on a list.
- Lists can actually be modified during an observation. Consider the screen below.


A user might wish to enter Sally Jones as the teacher being observed, but Sally Jones might not be listed in the pop-up list. The user has the option of typing the name directly into the Teacher box or editing the staff list directly from this dialogue.

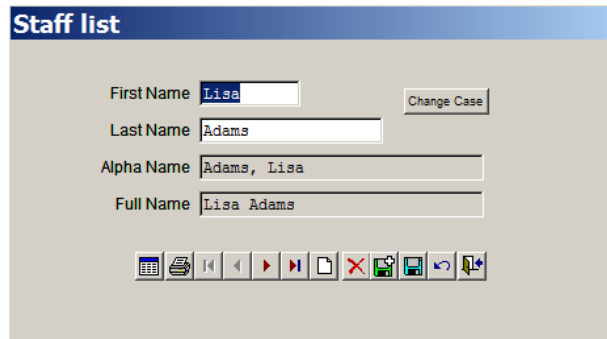
To add a new member to the STAFF list from this dialogue, click the STAFF  icon.

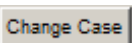
To add a new member to the STAFF list from this dialogue, click the STAFF  icon. The LIST maintenance dialogue will appear.

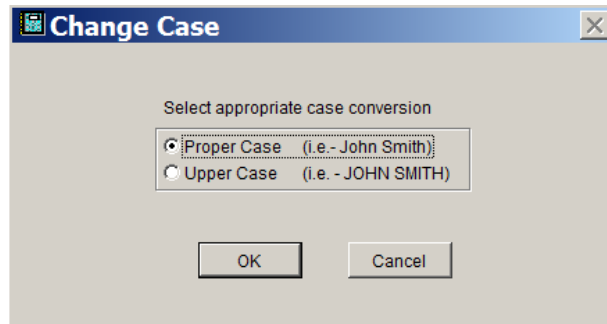
Use this dialogue to revise the list as described earlier, then click the EXIT  icon. The pop-up list will reflect the revision.

- The appearance of pop-up list content can be changed without retyping. For example, a list that was entered or imported in lower case can appear in upper case or in “proper” case, i.e., first letter of each name capitalized.

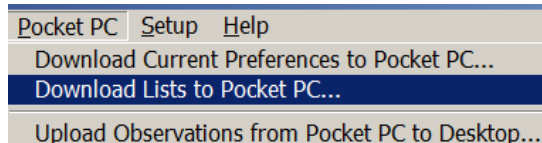
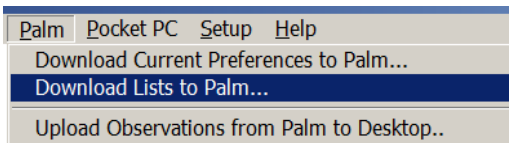
To adjust the displayed case of a list, click the STAFF  icon on the Intro tab or click **LISTS | EDIT LISTS | STAFF LISTS** from the main menu. The following dialogue will appear.



Click the CHANGE CASE icon . The following dialogue appears. The user should select the desired appearance and click **OK**.



- Lists can be downloaded for use on handheld devices such as Palm or Windows Mobile devices. The menu options to access this feature for Palm and Pocket PC handhelds are shown below.

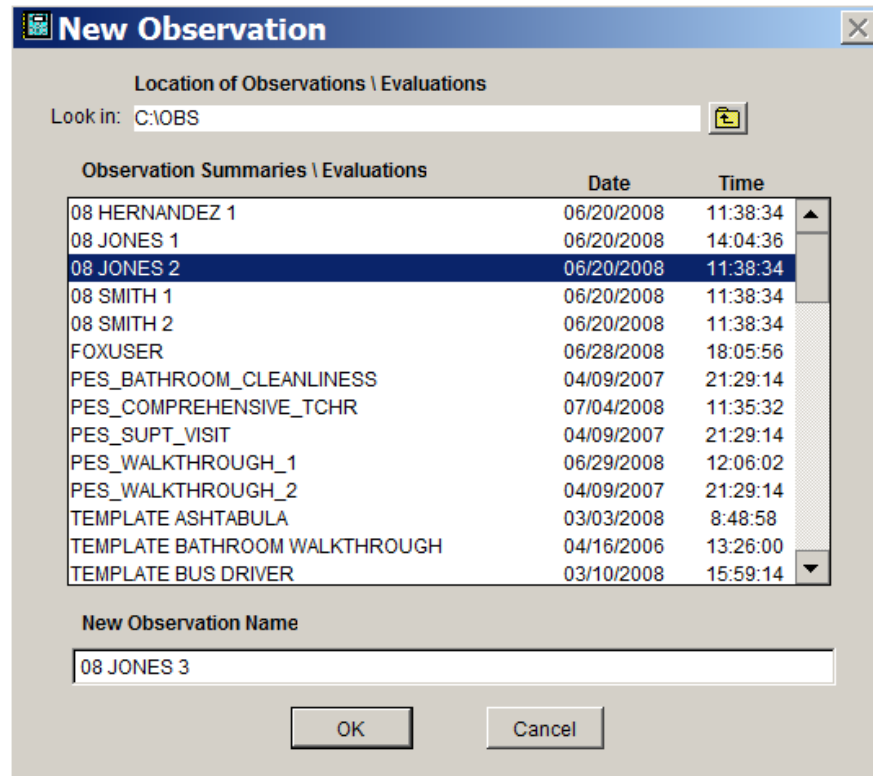


The process to download a list is described in detail in the Palm and Windows Mobile handheld sections of this manual. Once downloaded, list functionality is the same on the handheld as on the desktop PC, although list maintenance functions are present on the desktop PC only.

## Composing an Observation Summary

### Creating a new observation summary

Select **File | New Observation** from the main program menu bar. The New Observation dialogue screen will appear.



A name for your new observation summary must be entered before data entry can begin. The recommended file naming format is illustrated below.

### **08 Jones 2**

This protocol will always have three parts.

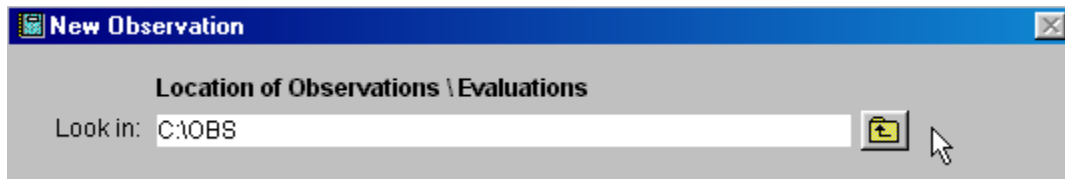
- the first two characters express the fiscal year
- the next characters are the teacher's last name
- the final character expresses the number of the visit, i.e. first, second, etc.

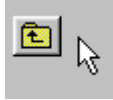
This method of naming files results in a directory listing which groups all observation summaries by alphabetical order within school years. Such systematic names for your observation files should make it easier to locate them after a substantial number of observation files accumulate over time.

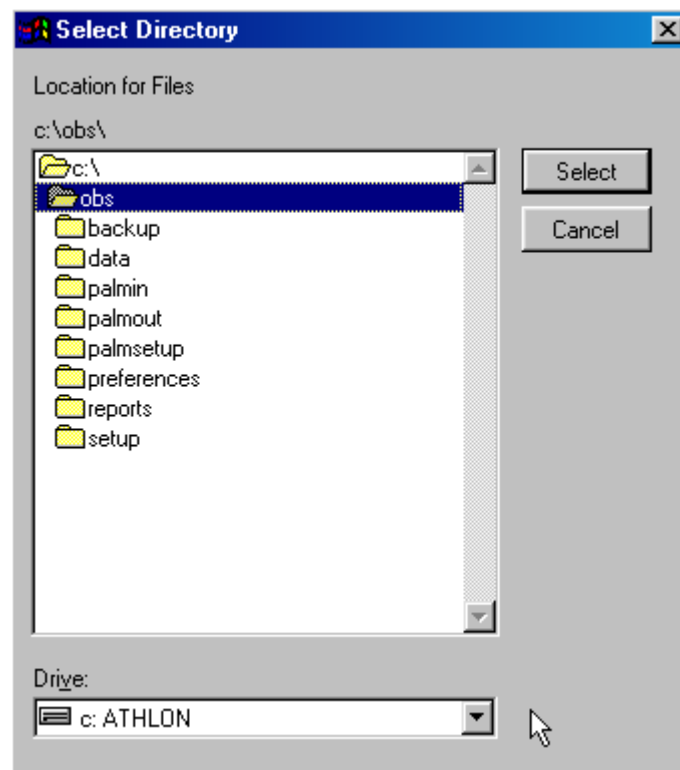
Enter the file name for your new observation summary and then click the **OK** button.

## Selecting Alternative Drives and Directories

Most users will be well served simply to use the default directories suggested by each dialogue when creating a new observation, when opening an existing file to editing, or when using the observation file manager. Some users, however, will prefer to select an alternative drive or directory. The “look in” feature at the top of each of these dialogues provides this functionality.



The user should click the folder icon with the up arrow  to view alternative drive or directory options. A navigation dialogue will appear.



Users can navigate to the desired drive and directory and click the **SELECT** button.

## Using the current user preferences

The initial data entry screen for composing your observation summary will appear after you enter the file name and click the **OPEN** button.

The screenshot shows a software window titled "Observation for Nancy Baker [06/18/2008]". The window has a tabbed interface with tabs for "Intro", "Preparation", "Components", "Instructional", "Assessment", "Classroom I", and "Closing". The "Intro" tab is selected. The main area contains several data entry fields: "Teacher" (Nancy Baker), "Date Observed" (06/18/2008), "Time" (1st Hour), "Class" (Biology), and "Students present" (23). A calendar pop-up for June 2008 is open, showing the date 18th selected. A "Preview" button is visible at the bottom left.

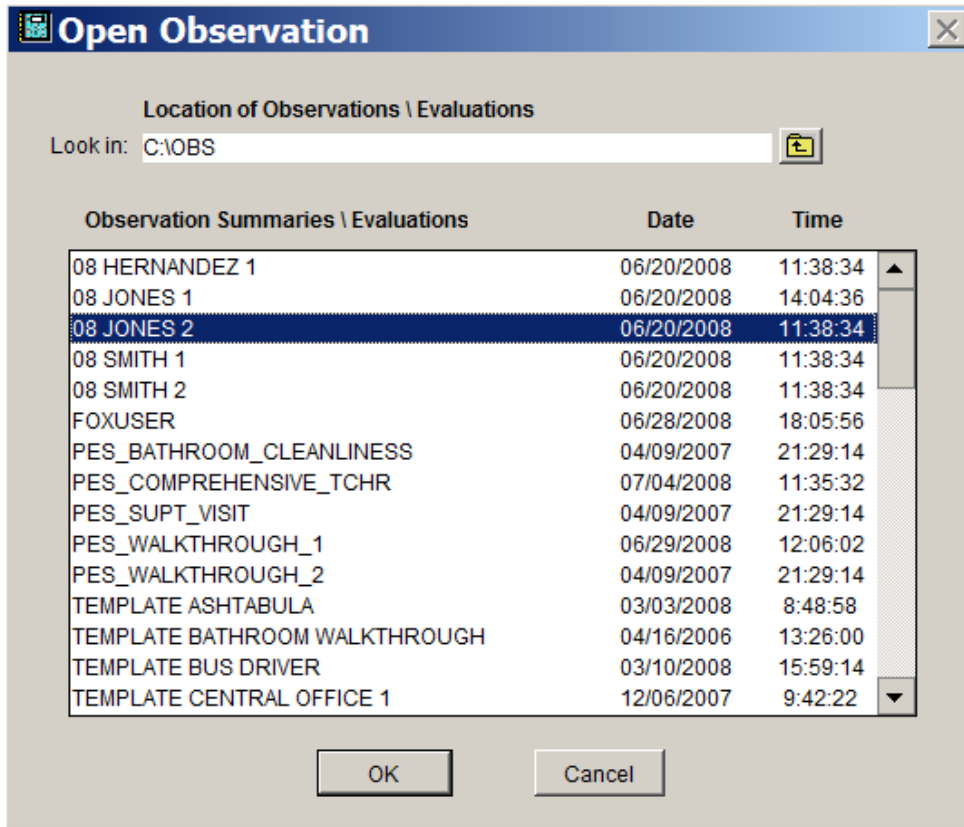
Enter the employee's name and other data into the boxes shown by typing them directly or by selecting from available pop-up lists. See the section on pop-up list maintenance elsewhere in this manual for details on establishing and maintaining pop-up lists. The date may be selected from a drop down calendar by clicking the down arrow on the Date Observed box to reveal the calendar, then clicking the date desired.

Click the **PREVIEW** button (illustrated above) to see how your observation summary looks so far.

Exit the preview by clicking the **CLOSE** icon .

## Completing or editing an existing observation summary

To complete an unfinished observation summary, or to edit a previously completed file, select **File | OPEN OBSERVATION** from the main program menu bar. The Open Existing Observation dialogue will appear.



To indicate the existing observation summary you wish to complete or edit,

- Click the file name and then click the **OK** button,

Or

- Double click the file name of your choice.

Either method will open the file for continued work.

## Revising or editing existing paragraph text

The user should click on each appropriate category tab, then modify the existing text or enter new text of the user's choosing.

Observation for Horace Mann [03/27/2003]

Intro Preparation Components Instructional Assessment Classroom M Closing

Preparation Ideas + Ideas -

Mr. Mann prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Mann clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn.

|     |                                     |  |
|-----|-------------------------------------|--|
| N/A | <input checked="" type="checkbox"/> | Planned appropriate activities to fill available class time. |
| N/A | <input checked="" type="checkbox"/> | Prepared sufficient instructional materials.                 |
| N/A | <input checked="" type="checkbox"/> | Clear statement of instructional purpose.                    |
| N/A | <input checked="" type="checkbox"/> | Established why lesson is important for students to learn.   |
| N/A | <input checked="" type="checkbox"/> | Reviewed student work from previous period.                  |
| N/A | <input type="checkbox"/>            |  |
| N/A | <input type="checkbox"/>            |  |
| N/A | <input type="checkbox"/>            |  |
| N/A | <input type="checkbox"/>            |  |
| N/A | <input type="checkbox"/>            |  |

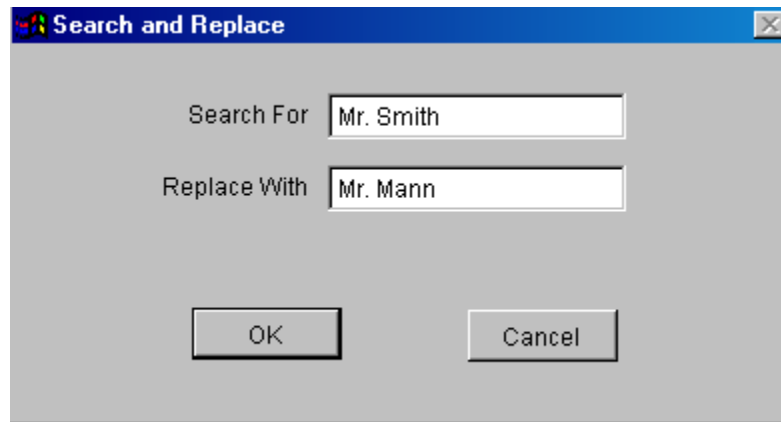
Reset Clear Entire Page

Preview Save Save As... Cancel Settings Search / Replace

From the title bar, the user is reminded this observation summary is being prepared for Horace Mann. The paragraph text, however, speaks about a “Mr. Smith.” The first step in completing this observation summary is to find all references to Mr. Smith and replace them with “Mr. Mann.”

## Using Search / Replace

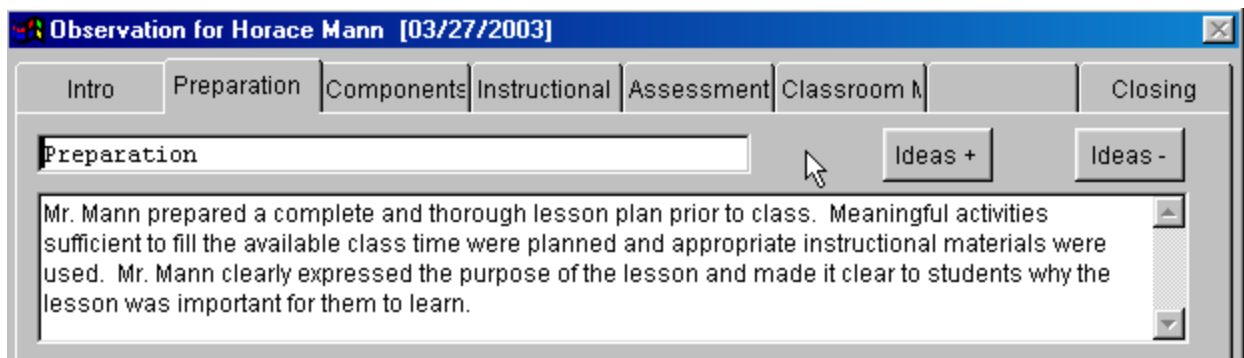
Click the Search / Replace button to reveal the Search / Replace dialogue.



Enter “Mr. Smith” in the Search For box. Then enter the name of the person currently being summarized in the Replace With box.

Clicking the **OK** button will replace all instances of “Mr. Smith” with “Mr. Mann” on every data screen.

The user will be returned to the tabbed data entry dialogue when the search and replace function is completed. Revision or editing of the paragraph text should be completed next.

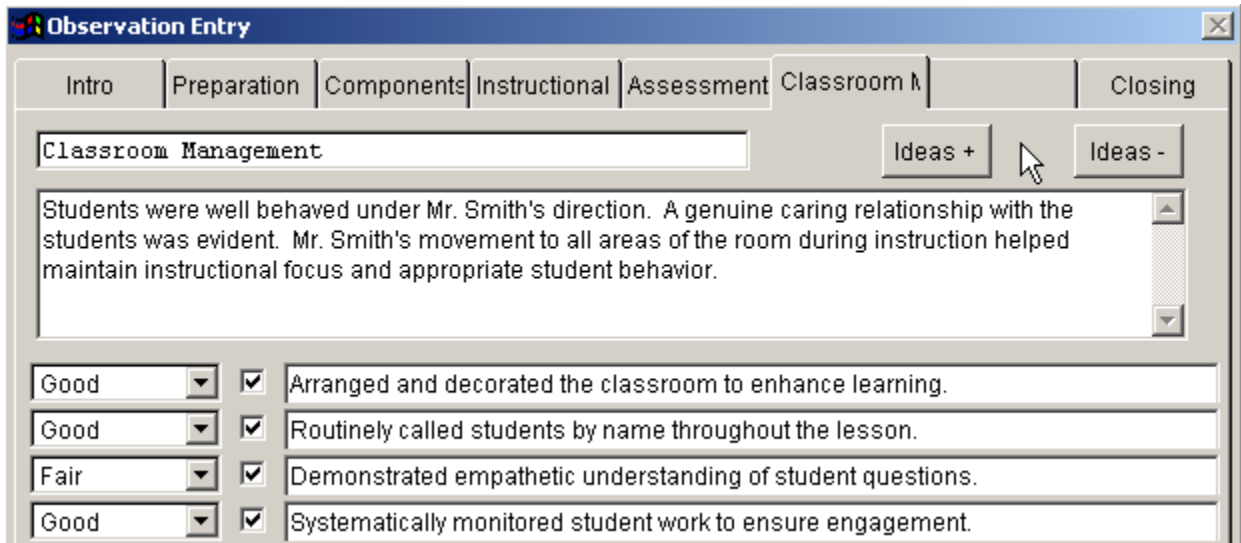


The paragraph text reflects the user’s current preferences. Click any word in the paragraph to begin editing if desired. Standard word processor functions for changing or adding text are active. While the illustration above shows only one paragraph, multiple paragraphs can be entered.

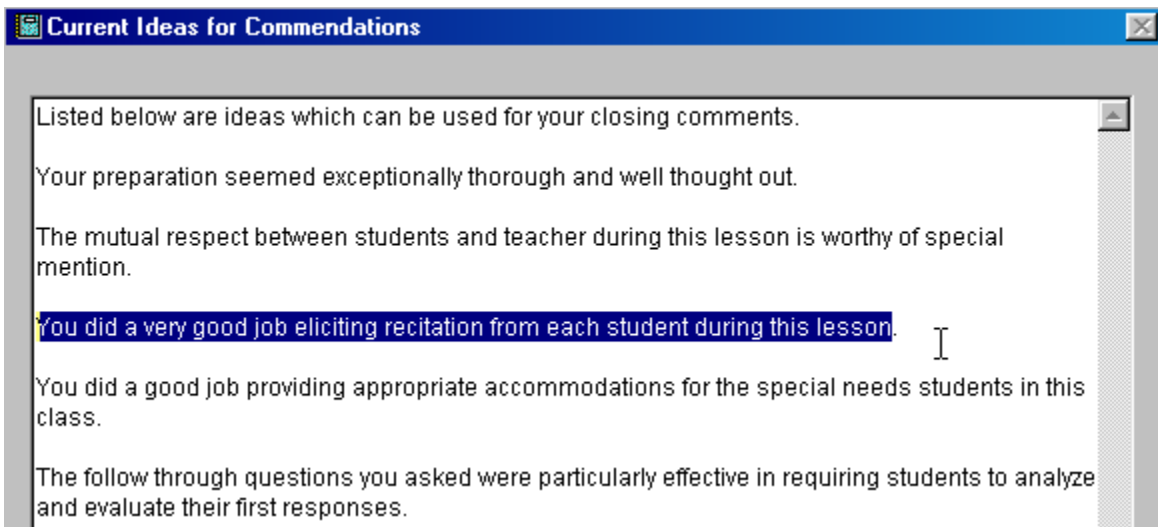
When the paragraph for the Preparation tab has been completed, the user should continue by rating each quality indicator below the paragraph in this category.

## Accessing IDEAS+ and IDEAS-

Text for paragraphs, quality indicators, and all other parts of the evaluation document can be entered directly from the keyboard. To reduce the need to re-type often used text segments, however, the **IDEAS+** and **IDEAS-** buttons allow the user to cut and paste frequently used phrases.



Clicking the **IDEAS+** button reveals text the user can insert by highlighting the desired text and then using the standard Windows functions for cut, copy, and paste.

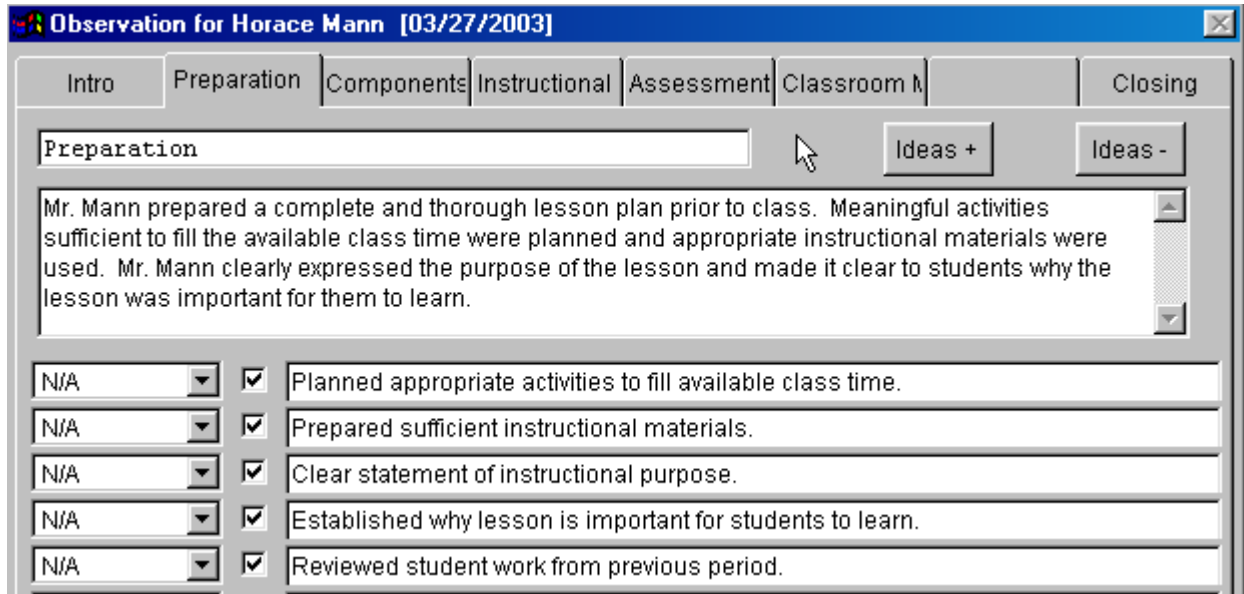


Shortcut key combinations for these Windows functions are reviewed below.

|       |          |
|-------|----------|
| Cut   | CTRL – X |
| Copy  | CTRL – C |
| Paste | CTRL - V |

## Activating, editing, and rating Quality Indicators

Quality indicators for each performance category are shown beneath the paragraph entry for that category.



Observation for Horace Mann [03/27/2003]

Intro Preparation Components Instructional Assessment Classroom M Closing

Preparation

Mr. Mann prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Mann clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn.

|     |                                     |  |
|-----|-------------------------------------|--|
| N/A | <input checked="" type="checkbox"/> | Planned appropriate activities to fill available class time. |
| N/A | <input checked="" type="checkbox"/> | Prepared sufficient instructional materials.                 |
| N/A | <input checked="" type="checkbox"/> | Clear statement of instructional purpose.                    |
| N/A | <input checked="" type="checkbox"/> | Established why lesson is important for students to learn.   |
| N/A | <input checked="" type="checkbox"/> | Reviewed student work from previous period.                  |

Quality indicators shown reflect the user's current preferences. They can (and should) be modified for each observation summary the user prepares. The user should make three decisions about each quality indicator.

**Activate?** Quality indicators are active if checked. Those without a check mark will not be included in the completed observation summary or evaluation.

**Edit?** Quality indicators may be used "as is" or modified to reflect a behavior of special importance to this observation.

**Assess** Judge the employee's performance by clicking the down arrow to reveal your rating scale and then selecting the most appropriate choice.



**Note:** Changes made while completing an observation summary will not change your current preferences. That must be done by selecting **PREFERENCES | EDIT PREFERENCES** from the main menu bar.

## Using the Supplied and Custom Performance Indicators

In addition to the performance indicators present in the user's preferences, a database of supplied and custom performance indicators can be accessed by **right**-clicking in one of the check box areas as shown by the location of the cursor in the illustration below.

|     |                                     |  |
|-----|-------------------------------------|--|
| N/A | <input checked="" type="checkbox"/> | Planned appropriate activities to fill available class time. |
| N/A | <input checked="" type="checkbox"/> | Prepared sufficient instructional materials.                 |
| N/A | <input checked="" type="checkbox"/> | Clear statement of instructional purpose.                    |
| N/A | <input type="checkbox"/>            | Established why lesson is important for students to learn.   |
| N/A | <input checked="" type="checkbox"/> | Reviewed student work from previous period.                  |

**Right**-clicking reveals the complete database of supplied indicators as illustrated below.

**Supplied Performance Indicators**

Performance Indicator Category

List Preparation Custom Indicators

Performance Indicators

| Indicator  |
|--|
| Creates clear and helpful vocabulary development activities to accompany each lesson.  |
| Established why the lesson is important for students to learn.                         |
| Expressed clear statement of instructional purpose.                                    |
| Maintains a comprehensive substitute teacher folder containing all needed information. |
| Planned appropriate activities to fill available class time.                           |
| Prepared sufficient instructional materials.   |
| Prepares clear concept organizers for students prior to class.                         |

Select

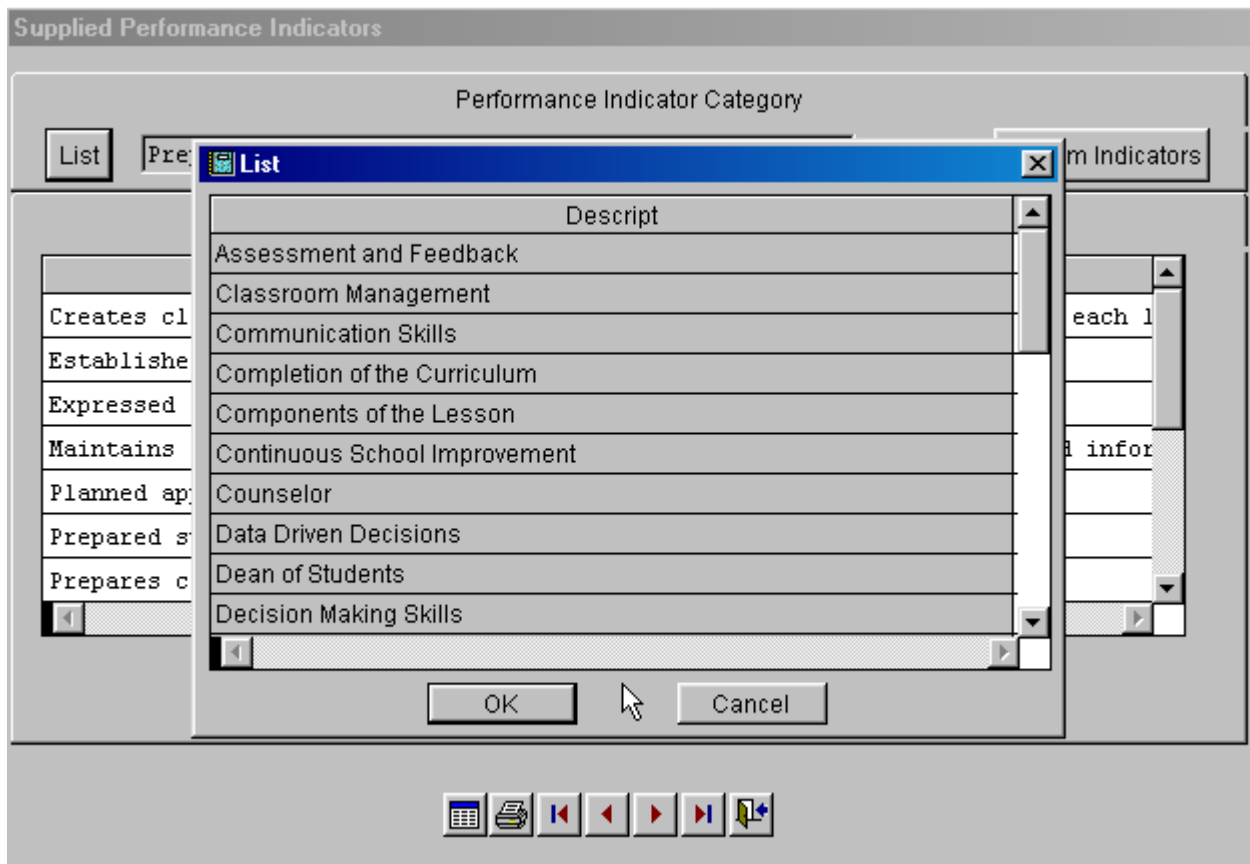
Calendar, Print, Home, Previous, Next, Refresh

Clicking on the **LIST** button and selecting the **PREPARATION** category reveals these potential choices of performance indicators. The user can either click the cursor on the desired indicator and then click **SELECT** or simply double-click the item desired directly. The desired indicator will then appear in the appropriate space as shown below.

|     |                                     |   |
|-----|-------------------------------------|---|
| N/A | <input checked="" type="checkbox"/> | Planned appropriate activities to fill available class time.                          |
| N/A | <input checked="" type="checkbox"/> | Prepared sufficient instructional materials.  |
| N/A | <input checked="" type="checkbox"/> | Clear statement of instructional purpose.   |
| N/A | <input checked="" type="checkbox"/> | Creates clear and helpful vocabulary development activities to accompany each lesson. |
| N/A | <input checked="" type="checkbox"/> | Reviewed student work from previous period.   |

While the supplied performance indicators cannot be changed while in that database, they **can** be edited when moved to the user's preferences or when placed in an active evaluation document. Considering the example above, the user should edit the performance indicators shown so they all use the present tense or the past tense, not a blend of the two.

While viewing the database of performance indicators, the user can choose from the many available categories by click the **LIST** button. Available category choices will appear as in the illustration below.

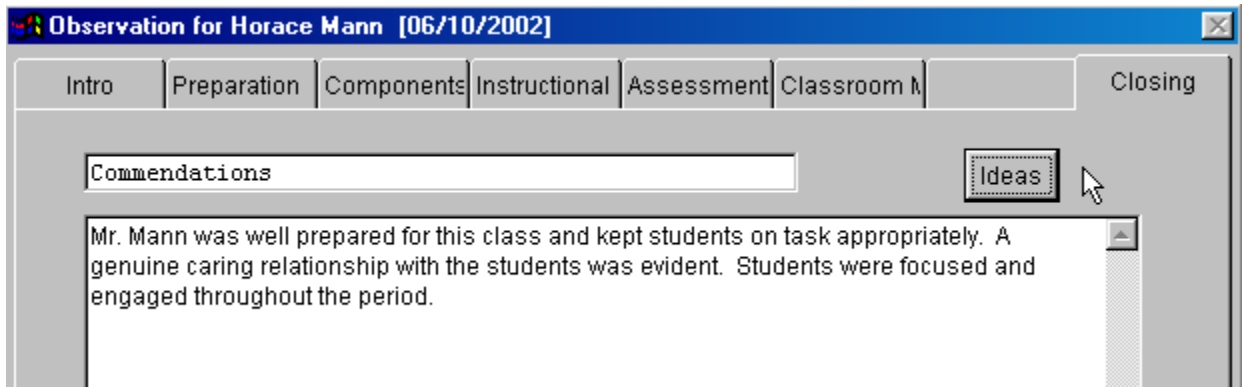


The scroll bar can be used to view additional categories. The user should double-click the desired category to see performance indicators available for selection.

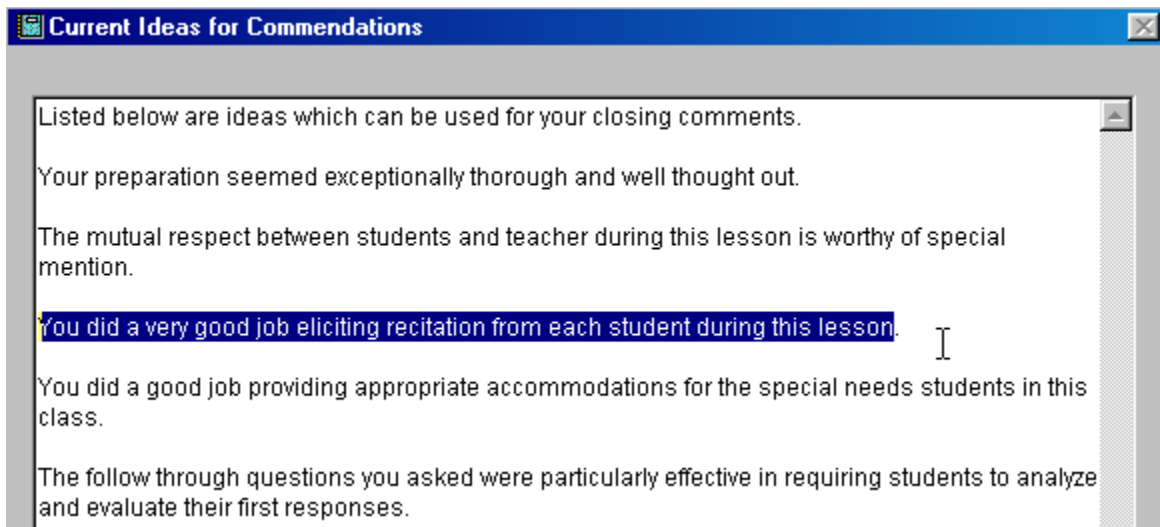
Even more performance indicators are available by clicking the **CUSTOM INDICATORS** button.

## Using IDEAS for Commendations & Recommendations

Text for the Commendations and Recommendations sections of the Closing tab can be entered directly from the keyboard. To reduce the need to re-type often used text segments, however, the Closing tab contains an **IDEAS** button that allows the user to cut and paste frequently used phrases.



Clicking the IDEAS button reveals text the user can insert by highlighting the desired text and then using the standard Windows functions for cut, copy, and paste.



Shortcut key combinations for these Windows functions are reviewed below.

|       |          |
|-------|----------|
| Cut   | CTRL - X |
| Copy  | CTRL - C |
| Paste | CTRL - V |

## Previewing the Observation Summary

The Observation Summary should be previewed on-screen prior to printing. **The Administrative Observer** provides several methods for previewing.

Most commonly, the user will click the **PREVIEW** button while using the data entry screen when composing an observation summary.

Observation for Horace Mann [03/27/2003]

Intro Preparation Components Instructional Assessment Classroom M Closing

Preparation

Ideas + Ideas -

Mr. Mann prepared a complete and thorough lesson plan prior to class. Meaningful activities sufficient to fill the available class time were planned and appropriate instructional materials were used. Mr. Mann clearly expressed the purpose of the lesson and made it clear to students why the lesson was important for them to learn.

|           |                                     |  |
|-----------|-------------------------------------|--|
| Good      | <input checked="" type="checkbox"/> | Planned appropriate activities to fill available class time. |
| Very Good | <input checked="" type="checkbox"/> | Prepared sufficient instructional materials.                 |
| Very Good | <input checked="" type="checkbox"/> | Clear statement of instructional purpose.                    |
| Good      | <input checked="" type="checkbox"/> | Established why lesson is important for students to learn.   |
| Excellent | <input checked="" type="checkbox"/> | Reviewed student work from previous period.                  |
| N/A       | <input type="checkbox"/>            |  |
| N/A       | <input type="checkbox"/>            |  |
| N/A       | <input type="checkbox"/>            |  |
| N/A       | <input type="checkbox"/>            |  |
| N/A       | <input type="checkbox"/>            |  |


Reset Clear Entire Page

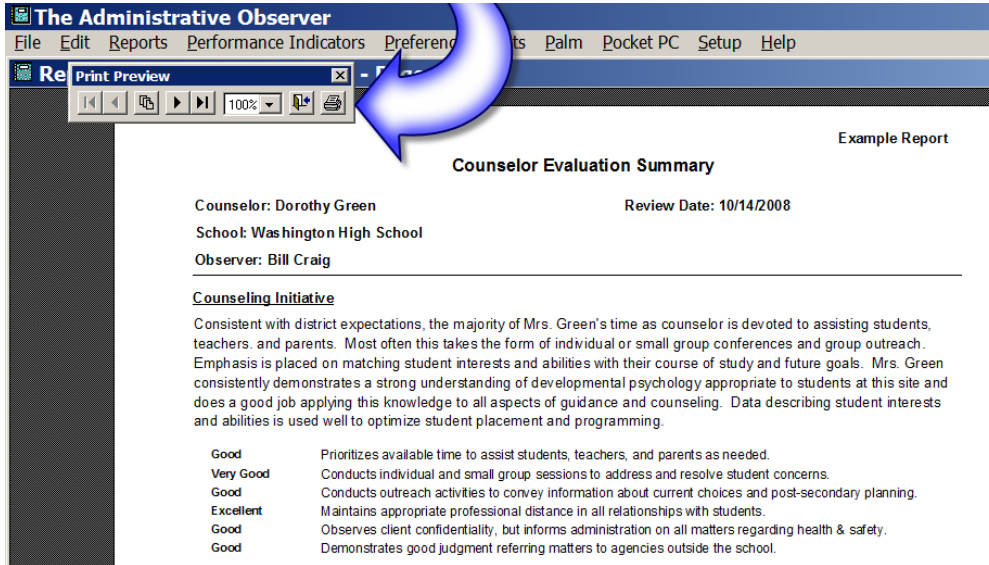
Preview Save Save As... Cancel Settings Search / Replace

For the user who is not at the observation summary data entry screen, an alternate method is to select **Reports | Observation Reports** from the main program menu bar. The resulting dialogue screen allows the user to select any one saved observation to preview.

A final alternative for the user who is not at the observation summary data entry screen is to select **File | Observation File Manager**. The resulting dialogue screen allows the user to preview or print one or more saved observation summaries. Use of the Observation File Manager is explained in detail in another part of this manual.

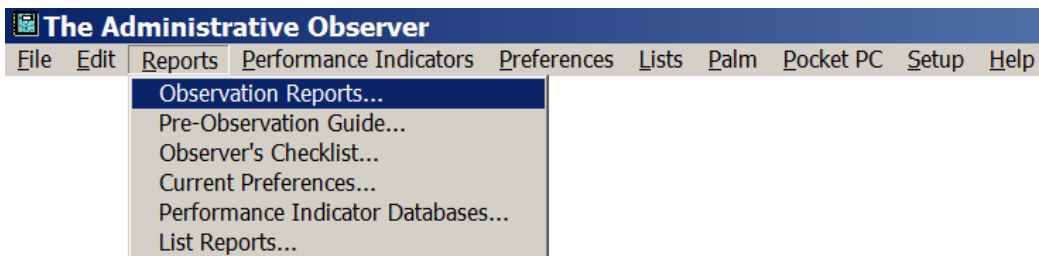
## Printing a Completed Document

Printing can be done from the document preview screen. When satisfied that the document contents are in final form, click the **PRINT** icon .

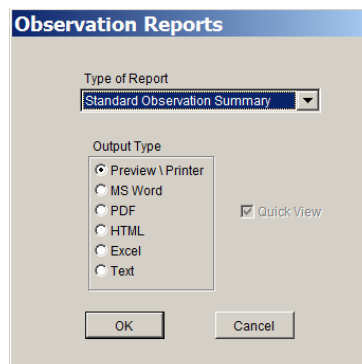


Documents can also be printed using the Observation File Manager, which is activated by selecting **File | Observation File Manager**. Use of this feature is explained in detail elsewhere in this manual.

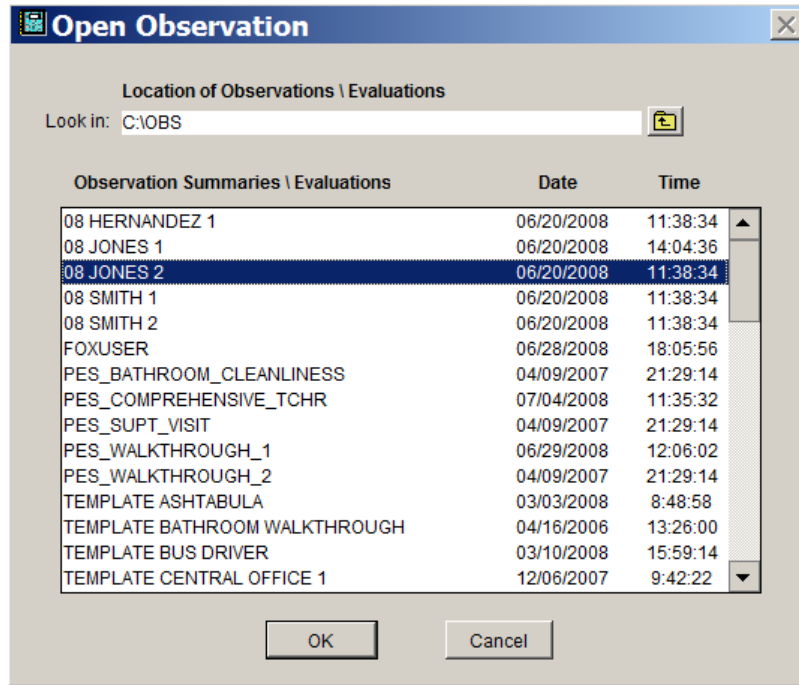
Printing will most often be done from the main REPORTS menu. The user will select **REPORTS | OBSERVATION REPORTS**



A report dialogue will prompt the user to select the document format and output type.



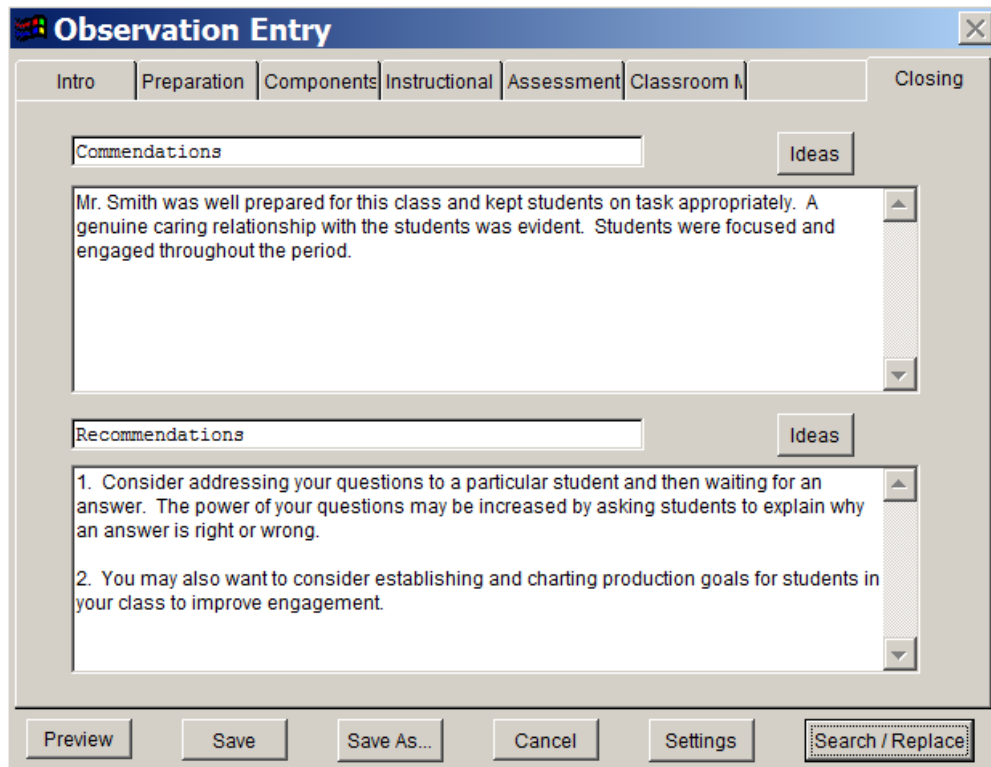
Click **OK** when the output choices have been selected. A document selection dialogue will appear.



Highlight the desired document and click **OK**. The document will be printed in the chosen format.

## Saving a completed Observation Summary or Evaluation

The Observation Summary file should be saved prior to leaving the data entry screen whenever text is added or changed. Click the **SAVE** button to complete your data entry and save your work.

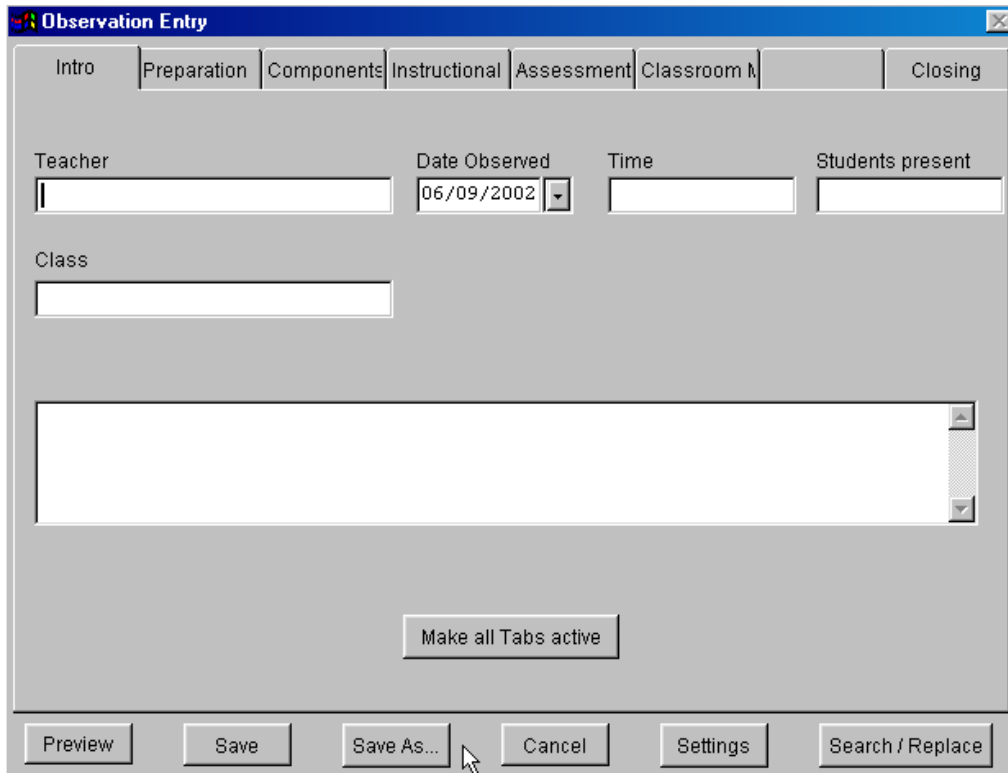


The screenshot shows a software window titled "Observation Entry" with a close button in the top right corner. The window has a tabbed interface with tabs for "Intro", "Preparation", "Components", "Instructional", "Assessment", "Classroom M", and "Closing". The "Components" tab is currently selected. Below the tabs, there are two main sections. The first section is labeled "Commendations" and contains a text area with the following text: "Mr. Smith was well prepared for this class and kept students on task appropriately. A genuine caring relationship with the students was evident. Students were focused and engaged throughout the period." To the right of this text area is a button labeled "Ideas". The second section is labeled "Recommendations" and contains a text area with the following text: "1. Consider addressing your questions to a particular student and then waiting for an answer. The power of your questions may be increased by asking students to explain why an answer is right or wrong. 2. You may also want to consider establishing and charting production goals for students in your class to improve engagement." To the right of this text area is another button labeled "Ideas". At the bottom of the window, there is a row of buttons: "Preview", "Save", "Save As...", "Cancel", "Settings", and "Search / Replace".

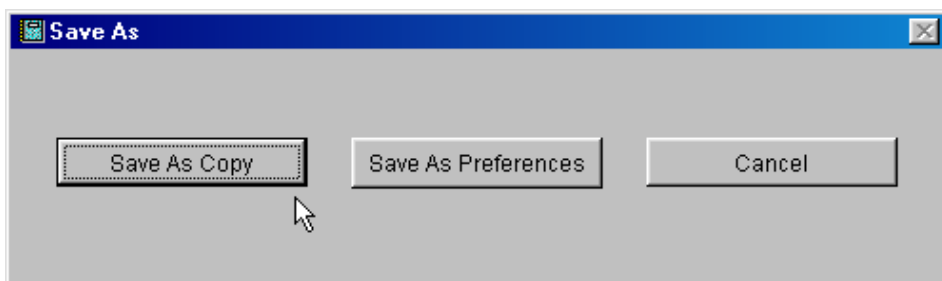
Alternatively, the user may select the **SAVE AS** button. Using **SAVE AS** allows important flexibility with **SAVE AS COPY** and **SAVE AS PREFERENCES**.

Using SAVE AS COPY and SAVE AS PREFERENCES.

The routine **SAVE** function is performed periodically during data entry or when data entry is complete. By contrast, **SAVE AS** should be used when an observation is first created or opened with empty fields in the opening data entry tab as shown below.



**SAVE AS** presents two options for flexibility shown below on the **SAVE AS** dialogue.



**SAVE AS COPY** allows the user to save a completed or partially completed observation with a different name for use with employees who have substantially similar reviews.

**SAVE AS PREFERENCES** should be used when the user nears completion of an observation or evaluation and wishes that its contents were reflected in the default preferences for the current employment type. **SAVE AS PREFERENCES** allows the user to avoid re-typing the content. As mentioned above, **SAVE AS PREFERENCES** should contain empty fields in the opening data entry tab

## Special Case Preferences – The Walkthrough Summary

The walkthrough summary preferences are supplied to help the user provide employee feedback following brief observation visits.

Select **Preferences | Walkthrough Observation Summary** to activate these preferences.

The walkthrough observation summary is distinguished by the use of fewer tabs than would be used for a longer observation. As supplied, tabs for observer perceptions and reflections are active.

| Rating    | Checked                             | Description   |
|-----------|-------------------------------------|---|
| Good      | <input checked="" type="checkbox"/> | Quiet, orderly classroom atmosphere.                    |
| Good      | <input checked="" type="checkbox"/> | Students appropriately engaged in meaningful activities |
| Fair      | <input checked="" type="checkbox"/> | Meaningful recitation from all students.                |
| Good      | <input checked="" type="checkbox"/> | Teacher skillfully guiding direct instruction.          |
| Very Good | <input checked="" type="checkbox"/> | Friendly, welcoming classroom environment.              |
| Very Good | <input checked="" type="checkbox"/> | Skillful classroom management.                          |
| Good      | <input checked="" type="checkbox"/> | Accommodations for special needs students.              |
| N/A       | <input type="checkbox"/>            |   |
| N/A       | <input type="checkbox"/>            |   |
| N/A       | <input type="checkbox"/>            |   |

Walkthrough observation summaries may be completed using rated or unrated performance indicators. The unrated style simply generates a list showing characteristics the observer saw without giving them a rating.

To generate an unrated summary, you must leave a blank in your rating scale as shown below.

The screenshot shows a dialog box titled "Current Observation Settings" with three tabs: "Report / Title Choices", "Observation Rating Scale", and "Observer Information". The "Observation Rating Scale" tab is selected. It contains five rows, each with a label and a text input field:

- Choice 1: [ ]
- Choice 2: [ Poor ]
- Choice 3: [ Fair ]
- Choice 4: [ Good ]
- Choice 5: [ Very Good ]

At the bottom of the dialog are "OK" and "Cancel" buttons.

The use of a blank box in the rating scale can result in a report like the one shown below.

|   |   |
|---|---|
| <b>Confidential</b>   |   |
| <b>Walk Through Observation Summary</b>   |   |
| <b>Teacher: Sarah Evans</b>   | <b>Date Observed: 06/17/2008</b>                        |
| <b>Subject: Biology</b>   | <b>Time: 9:20 - 9:26</b>                                |
| <b>Observer: Bill Craig</b>   |   |
| <hr/>   |   |
| <b><u>Perceptions</u></b>   |   |
| I saw many good things when I visited your classroom today. My perceptions are summarized below.            |   |
|   | Quiet, orderly classroom atmosphere.                    |
|   | Students appropriately engaged in meaningful activities |
| <b>Very Good</b>  | Meaningful recitation from all students.                |
|   | Friendly, welcoming classroom environment.              |
| <b>Very Good</b>  | Skillful classroom management.                          |
| <b><u>Reflections</u></b>   |   |
| I encourage you to reflect on the areas listed below and consider what changes, if any, might be warranted. |   |
| No recommendations at this time. Keep up the good work.   |   |

## **Special Case Preferences – The Blank Observation Summary**

A completely blank set of preferences is supplied for the user who might prefer to build preferences without the need to delete the content of one of the supplied preferences.

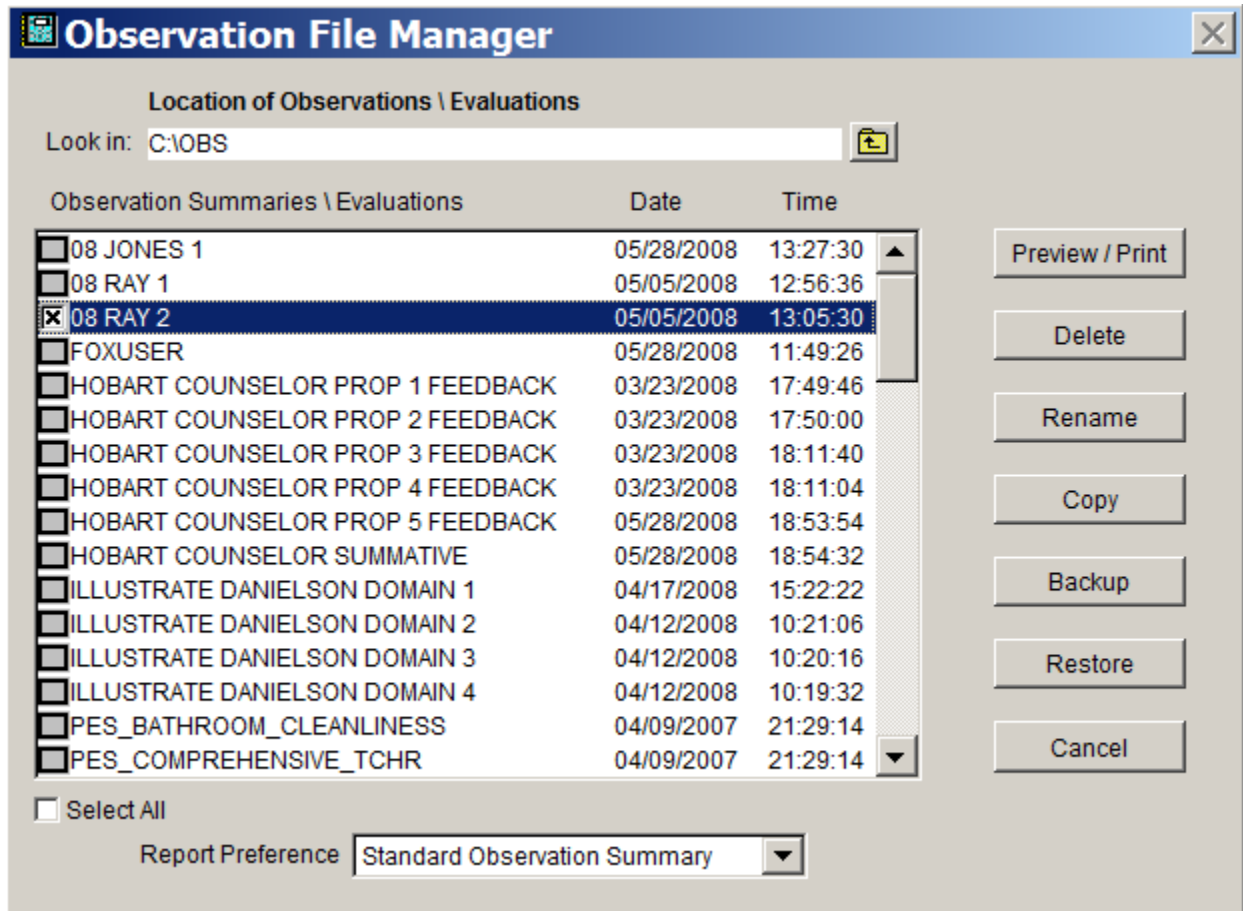
Select **Preferences | Blank Observation Summary** to activate these preferences.

All content will be blank. The user can type in all desired content or use the database of supplied performances as a toolkit.

## Using the Observation File Manager

The Observation File Manager provides the user several tools for maintaining completed or partially completed observation or evaluation files.

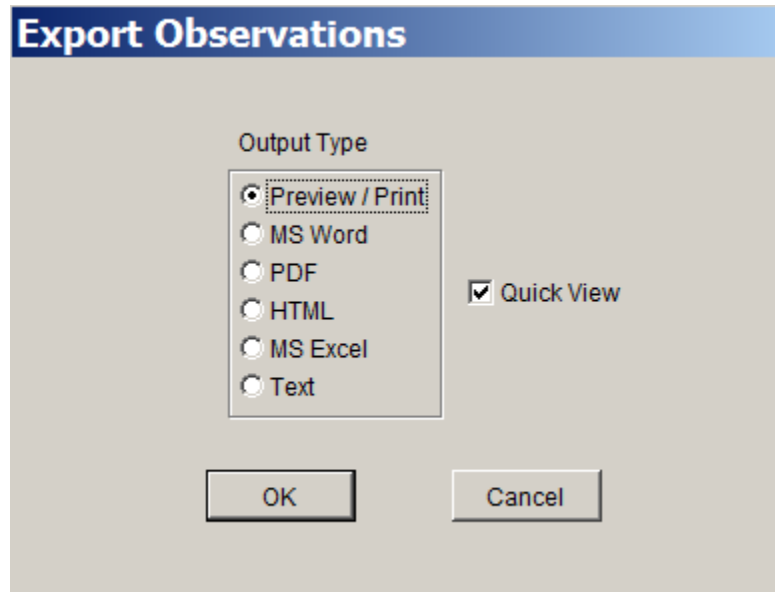
Select **File | Observation File Manager** to activate the following dialogue.



Click the square box beside each file name you wish to use from this dialogue. More than one observation file can be specified for a given action. In this example, only the observation file for Sally Ray entitled "08 Ray 2" has been selected.

The functions available to the user are listed by name on the buttons.

The **PREVIEW / PRINT** button allows the user to preview on-screen, print directly or export the observation file to a variety of formats. The user should indicate the preferred output type, then click **OK**.



The **DELETE** button should be used with caution. Observations cannot be retrieved once deleted. Note that many files can be deleted at once if the boxes to the left of the file names contain an "X".

The **RENAME** button allows the user to rename a file for any reason.

The **COPY** button allows the user to duplicate an existing template file to save time in the preparation of a new observation summary. See the section regarding templates elsewhere in this manual for more discussion. A standard file naming protocol should be used in naming the copied templates.

The **BACKUP** button creates exact copies of all checked files in a different location. By default, documents will be stored in the C:\OBS\BACKUP directory. Users who understand directory structure may specify a different location.

The **RESTORE** button retrieves copies of previously backed-up files and places them in the current active file location. The user will be prompted to indicate the location of the files to be restored and the destination.

The **CANCEL** button should be used to exit the Observation File Manager when all file management activities are completed.

## Creating and Using Templates

Templates can increase user efficiency. To create and use templates, the user must first get preferences language for each desired job category in order. Follow the steps given below to create a template for any job category. In this illustration, a template for an elementary school teacher will be created.

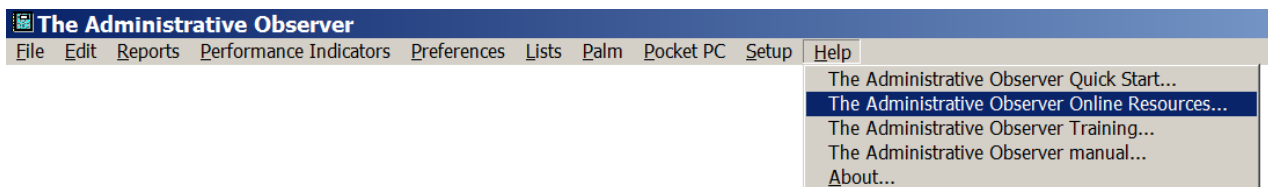
- Choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School** to begin.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Choose **File | New** and enter the file name Template Elementary.
- Click **SAVE** without completing any part of the data entry.
- Repeat the process for any job category you might use frequently.

To use the template as a starting point for an observation summary or an evaluation, the user would choose **File | Observation File Manager**, then complete these steps.

- click in the box next to Template Elementary,
- use the **COPY** feature, naming the copied template 08 Johnson 1, for example
- exit the Observation File Manager
- use **FILE | OPEN** from the menu bar to choose 08 Johnson 1

Some users find having a collection of templates is more useful than importing preferences each time evaluations for a new job category are begun.

**Illustrative Templates**. A collection of useful templates is available for download to illustrate possibilities for template construction. Click **HELP | THE ADMINISTRATIVE OBSERVER ONLINE RESOURCES** and follow the logical prompts.



### Important Note for Handheld Users

If you wish to download the contents of your template to your handheld device, you must first use the **SAVE AS PREFERENCES** option. While the template is open on your Windows desktop, click the **SAVE AS** button, then choose **SAVE AS PREFERENCES**. Having done this, select **Palm** or **Pocket PC** on the menu bar and download the preferences to the handheld device.

## Changing Current Preferences

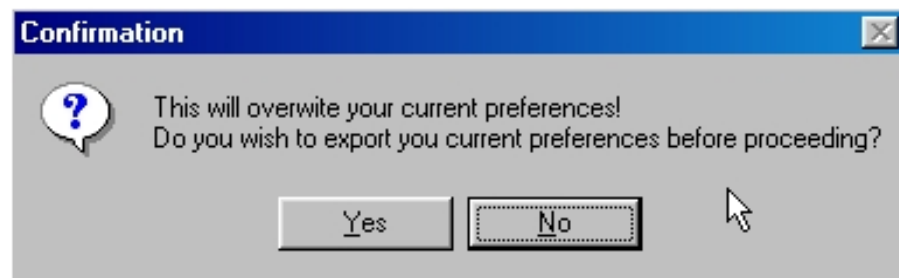
The user may wish to change current preferences from time to time. This can be done several ways.

1. Editing default preferences
2. Selecting new default preferences
3. Importing preferences previously saved.

It is recommended that user preferences be saved whenever they are revised and whenever new preferences are being set or imported.

**Saving Preferences.** User preferences can be saved by selecting **PREFERENCES | EXPORT PREFERENCES** from the Menu Bar. This will bring up a dialog suggesting several folders to house your preferences. Select the folder most appropriate to the active preferences you wish to save. Preferences saved in this manner can be recalled or **IMPORTED** by accessing **PREFERENCES | IMPORT PREFERENCES** from the Menu Bar at the user's convenience.

**Cautionary Dialogs.** Two cautionary dialogs will appear whenever the user begins to select or import new preferences. The first is shown below.



Users should normally respond by clicking **YES** and saving current preferences for future use. A second dialog will also appear, even if a user saves current preferences.

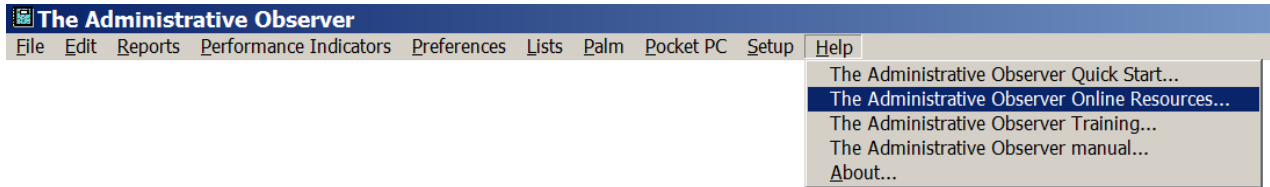


The user will normally click the **YES** button and proceed with the newly selected preferences.

## Available Online Help

**Help** is available through a comprehensive manual and via tutorial videos, both of which can be access by clicking

### HELP | THE ADMINISTRATIVE OBSERVER ONLINE RESOURCES.



**Training.** Convenient, affordable, and personalized training is available via Internet or at your site. After customizing the training agenda to your specific needs, a certified training specialist will guide you and your colleagues, answer your questions, and get you off to a good start.

The typical half-day training session will minimize your learning curve and make you productive faster. Visit <http://www.42regular.com/training> for more information or call 815-222-3811 during normal business hours.

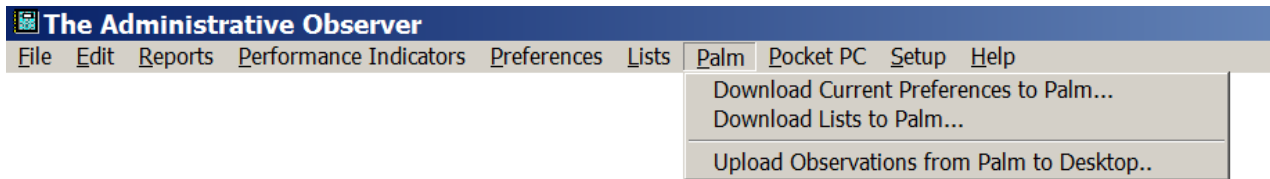
## The Administrative Observer on Palm OS handhelds

*The Administrative Observer* allows data entry at your convenience using a Palm handheld computer. Whether used while observing the employee or later while away from the desktop PC, the handheld module greatly increases the convenience of data entry.

Software to install *The Administrative Observer* on Palm handheld computers can be activated from the Windows **START** menu on your desktop PC after the core standard edition desktop program has been installed from CD and updated to the most current version from the website ([www.pes-sports.com](http://www.pes-sports.com)).

A separate license fee is required for the handheld feature. Contact the publisher to activate the handheld module. E-mail contact information for this purpose is given on the title page to this manual. It can also be found on the handheld screen which prompts the user to enter an unlock activation code.

In general terms, installation and operation of The Administrative Observer is virtually identical on the Palm and the Pocket PC. The desktop menu bar has separate but identical dropdown menus for the Palm and for the Pocket PC.



There are, however, small differences in process for each device. For this reason, separate sections of this manual will describe installation, activation, and operation on each handheld type.

## Supported Handheld Devices

|                      |   |
|----------------------|---|
| Blackberry           | <p>Most models including ...<br/>Curve, Bold, Tour, Pearl, World Edition and Storm</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - 4.2.1 or later</p>              |
| iPhone               | <p>All generations of iPhone, iPod Touch, and iPad</p> <p>Utilizes <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Windows<br>Mobile    | <p>Most handhelds including ...<br/>HP iPaq series, Dell Axim series, Treo series</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Windows Mobile 2003 or later</p> |
| Android              | <p>Most models utilizing Mobile Web version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>  |
| Palm                 | <p>Most models including Tungsten, TX, Centro, Treo series</p> <p>Palm Pre/Pixi utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Palm OS 3.5 or later</p>                              |
| Other<br>smartphones | <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |

## Installing *The Administrative Observer* on a Palm OS handheld

Note: The Palm Desktop software (supplied by Palm) and *The Administrative Observer* desktop software (from CD) must be installed before attempting handheld installation.

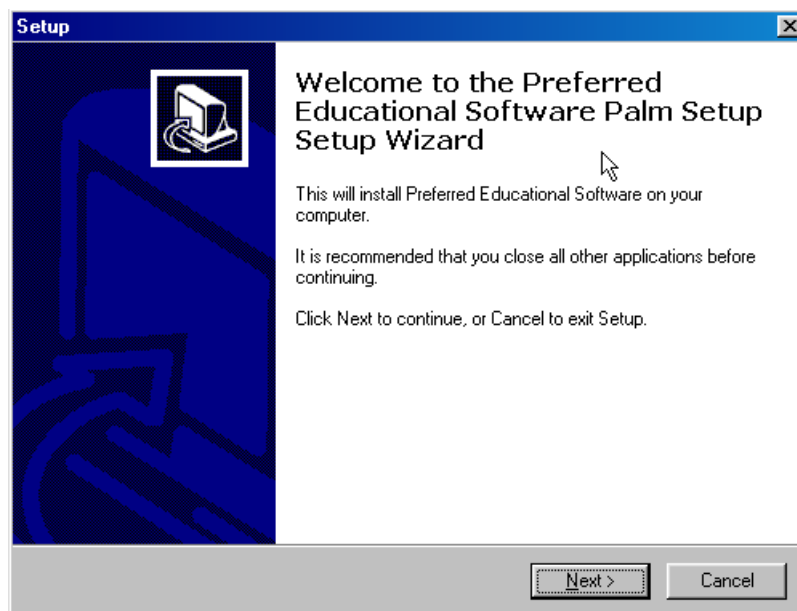
The installation requires five sequential steps to make *The Administrative Observer* operational on the user's handheld computer.

1. Installation of the Palm hotsync conduit,
2. Installation of *The Administrative Observer* on the handheld device,
3. Activation of *The Administrative Observer* on the handheld device, and
4. Installation of user preferences on the handheld device via hotsync
5. Installation of available pop-up lists via hotsync

### Step #1 Installing the Palm handheld hotsync conduit

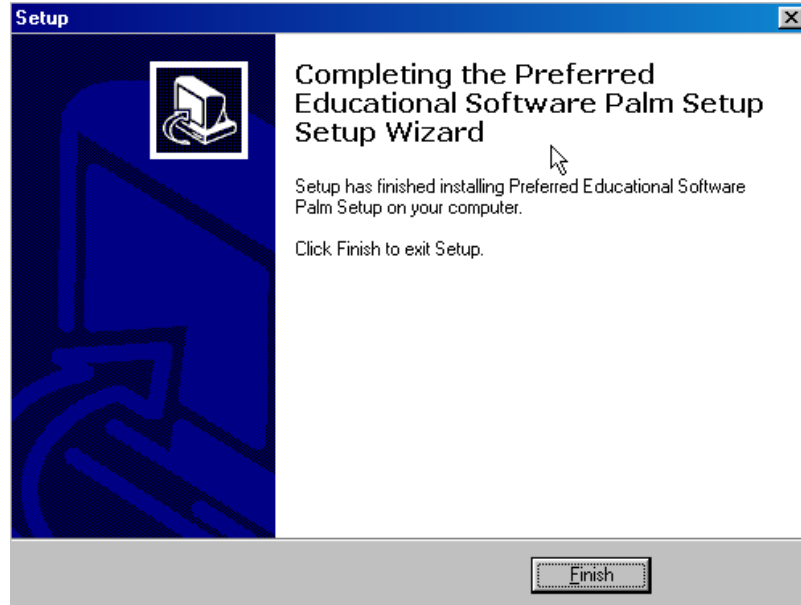
For best results, users should first install the *latest* version of the Palm Desktop software. Additionally, it is important to close the Palm hotsync manager during this installation.

Close all other applications, *including* the Palm HotSync manager. Select **Start Menu | Programs | The Administrative Observer | Install Palm HotSync Conduit**. An informational dialogue will appear.



Click the **Next** button to continue. Accept the prompts as presented to complete the installation of the Palm-specific conduit for *The Administrative Observer*.

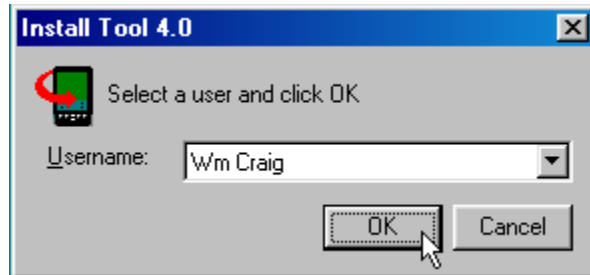
Click the **Finish** button when the screen shown below appears.



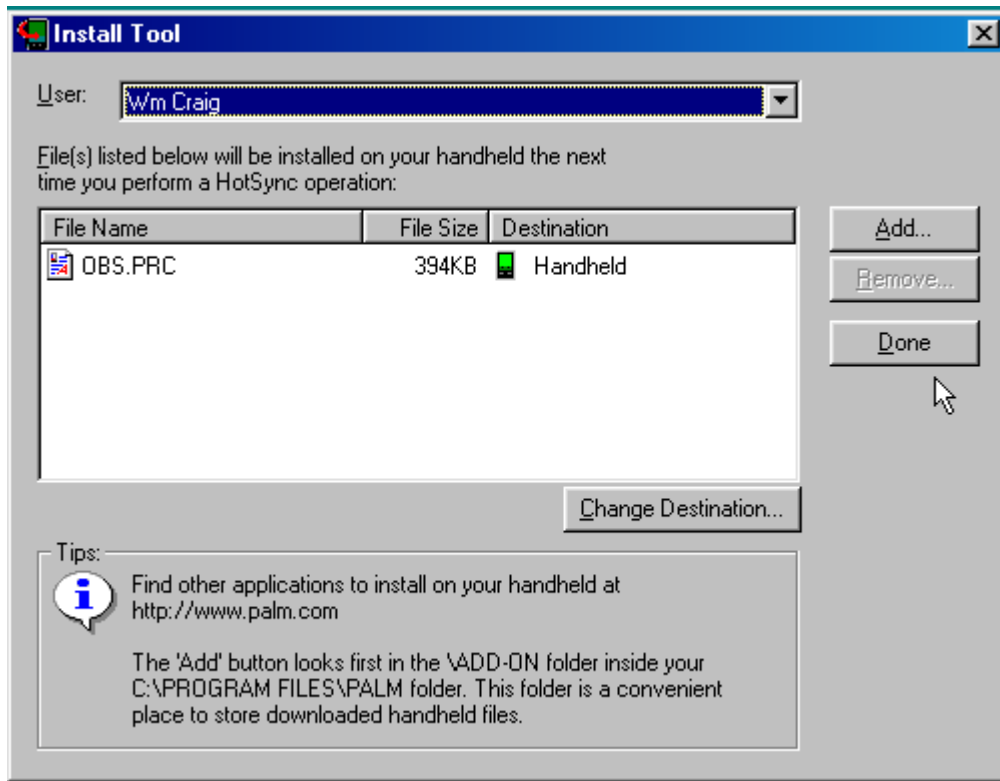
After re-starting the computer, the user should connect the Palm device to the desktop computer and start the HotSync process. This will complete the installation of ***The Administrative Observer*** conduit on the handheld device.

**Step #2 Installing *The Administrative Observer* on a Palm handheld device.**

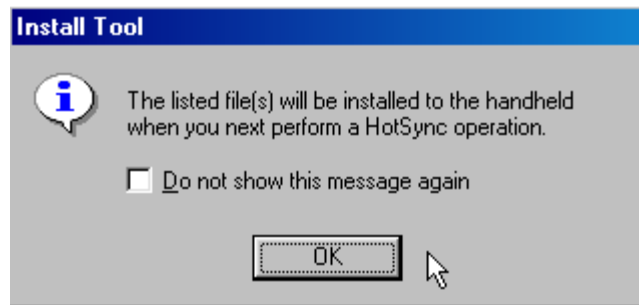
From the **Start Menu**, select **Start Menu | Programs | The Administrative Observer | Install Observer on Palm Handheld**. An informational dialogue will appear.



Be sure the correct user name appears, then click the **OK** button. That will cause a second informational dialogue to appear.



This dialogue confirms that ***The Administrative Observer*** will be installed on your Palm handheld computer when the next hotsync operation is performed. Click the **DONE** button. A final, confirming dialogue will appear. Click **OK** to close the dialogue.



## **CAUTION**

Users should run this installation only once. Each subsequent installation will

- (1) overwrite all existing observations on your handheld and
- (2) require the user to obtain a second registration code from technical support.

## **Step #3 Activating The Administrative Observer on the handheld device**

The Palm handheld will show an install program icon similar to the one displayed below.



The user should tap the displayed icon to activate the program.

The registration screen will appear the first time the program is run on the Palm device.



The user should tap the REGISTER icon to proceed to the registration code screen.



The user must contact Preferred Educational Software by e-mail at this point to obtain a registration code based on the device id shown on the screen. Contact information is given on the cover page of this manual and on the handheld screen.

Please allow up to twenty-four hours to receive your activation unlock code. After the registration code unlocks **The Administrative Observer**, the **REGISTER** icon on the welcome screen will be replaced by an **OK** button.

## Password Protection for *The Administrative Observer* on a Palm handheld

The user should tap the **OK** button with the stylus to advance to the password entry screen.



The password entry screen provides security to keep observation records or evaluations done on the handheld safe from unauthorized viewing or modification. Users are encouraged to create and use a password.



No password is active on first use, nor is one required. The first time user should leave the password line blank and press the **OK** button. The following screen will appear.



Users who choose to use a password should tap the **PWD** icon. The current password must be entered before a password change will be allowed. When creating a password for the first time, users will see the following screen on the handheld and should simply press the **OK** button without entering a password.



The user will be prompted to create a new password by the screen below.



The new password must be used for all subsequent sessions with ***The Administrative Observer*** on the handheld device.

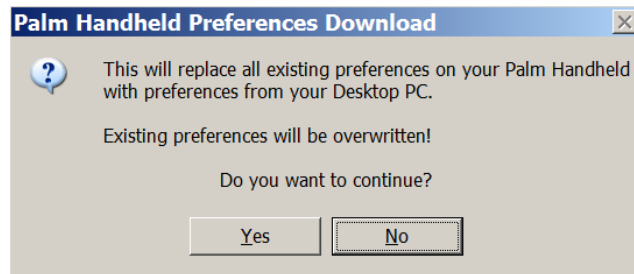
### **Forgotten passwords**

***The Administrative Observer*** cannot be accessed without a password after one has been created. Users who forget a password should contact Preferred Educational Software using the e-mail address shown on the title page of this manual.

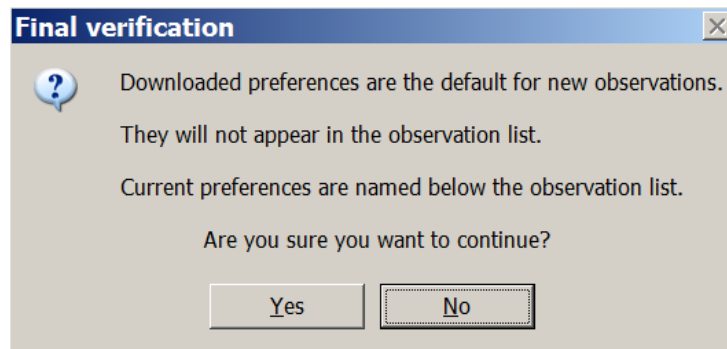
#### **Step #4 Installation of user preferences on Palm handheld devices via hotsync**

The user should select and edit default preferences for *The Administrative Observer* using the procedure described earlier in this manual. Those preferences will be downloaded via hotsync for use on the handheld.

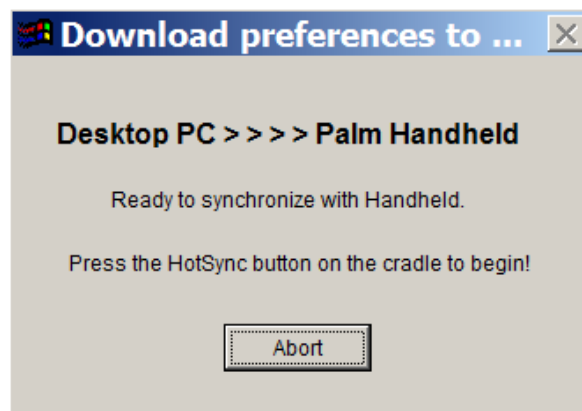
The user should select **PALM | DOWNLOAD CURRENT PREFERENCES TO HANDHELD** from the menu bar. A cautionary dialogue will appear.



The user should click the **YES** button to download the current desktop preferences into the handheld device. A second cautionary dialogue will appear.



The user should click the **YES** button here as well. The HOTS SYNC dialogue will appear.

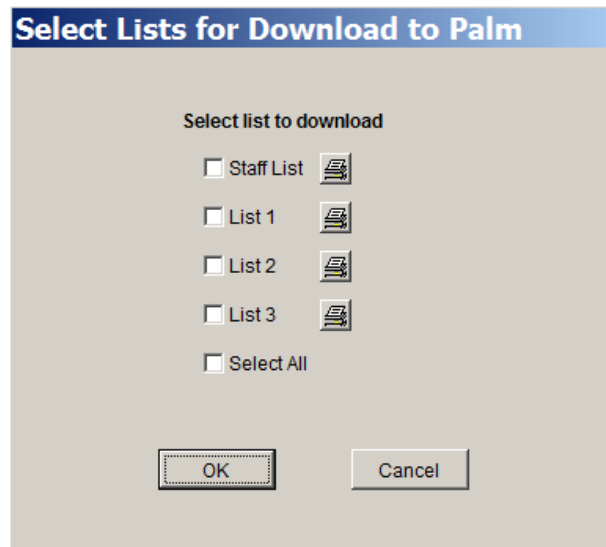


The user should verify that the handheld is connected to the desktop PC, then activate the HotSync process.

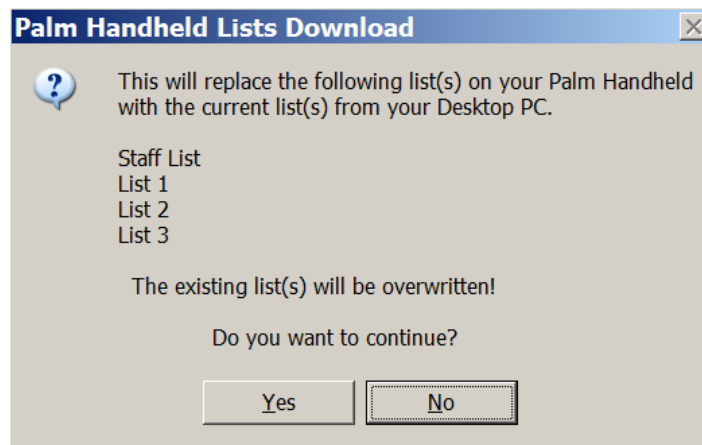
## **Step #5 Installation of pop-up lists on Palm handheld devices via hotsync**

Pop-up lists created for *The Administrative Observer* on the PC desktop can be downloaded via hotsync for use on the handheld. See the earlier section detailing the process for establishing and populating pop-up lists.

The user should select **PALM | DOWNLOAD LISTS TO PALM** from the menu bar. The lists selection dialogue will appear.

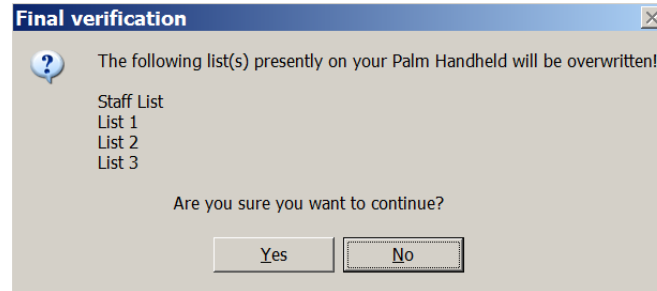


The user should indicate which lists are to be downloaded, then click **OK**. A cautionary dialogue will appear.

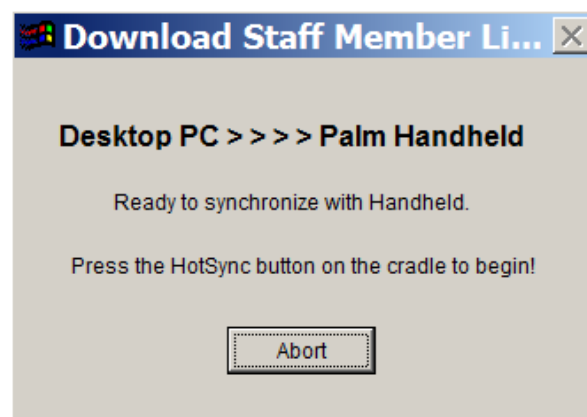


The user should click the **YES** button to download the selected pop-up lists to the handheld device.

A final cautionary dialogue will appear.



The user should click the **YES** button here as well. The HOTSYNC dialogue will appear.

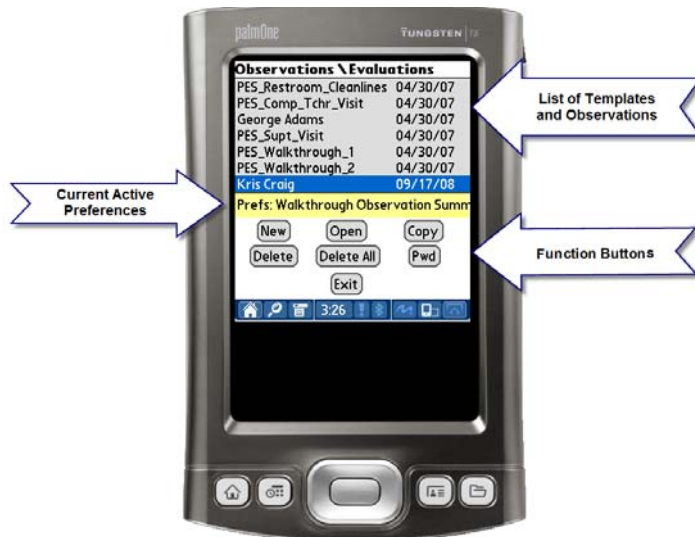


The user should verify that the handheld is connected to the desktop PC, then activate the HotSync process.

## Operation of *The Administrative Observer* on Palm handheld computers

### Overview

The initial handheld screen for *The Administrative Observer* is shown below. It is important to note that current preferences will always be shown in the middle of the screen as indicated below, not in the file listing.



The primary operational functions are indicated by the illustrated buttons.

**NEW** allows the user to create a new observation on the handheld. That observation will always reflect the most recent preferences downloaded from the desktop.

**OPEN** allows the user to complete or modify an observation or evaluation begun earlier.

**COPY** allows the user to copy a template to use as a starting point for a observation. This can be especially useful to avoid frequent downloading of preferences.

Example. A user could download preferences to evaluate custodians and use them to create a NEW file on the handheld entitled CUSTODIAN TEMPLATE. The user could then download preferences to record teacher observations and use them to create a NEW file on the handheld entitled TEACHER TEMPLATE.

With templates on the handheld, downloading from the desktop is not needed unless major changes to the default preferences were made. A user would **COPY** the custodian template and give it a new name such as TOM SMITH. Similarly, a user would **COPY** the teacher template and give it a new name such a SALLY JONES. While there can be only one set of preferences active to create new files on the handheld, there can be many template files that allow shifting between preferences using the **COPY** function.

**DELETE** allows the user to delete work done on the handheld when it is no longer needed. This is typically done after the observation or evaluation files are uploaded to the desktop unit for final editing, printing, and archiving.

**DELETE ALL** allows the user to delete all files on the handheld at once. Use this function with caution. Deleted files on the handheld **cannot** be recovered.

**PWD** allows the user to create or change passwords to prevent unauthorized viewing or modification of observation or evaluation files on your handheld.

**EXIT** allows the user to exit *The Administrative Observer* gracefully. To prevent possible data loss, users are encouraged to use the **EXIT** button instead of pressing the **APPLICATIONS** buttons on the handheld device.

## Creating a **NEW** observation or evaluation on the handheld

Tapping the **NEW** icon will cause the following screen to appear.



The user is required to enter a staff member name at the prompt. No other function will be allowed until a name is entered at this screen. The staff member name will be recorded as the file name on your handheld.


After entering a name at the staff member prompt, the user will be able to complete data entry for this first screen or to switch between all other data entry screens for this observation.

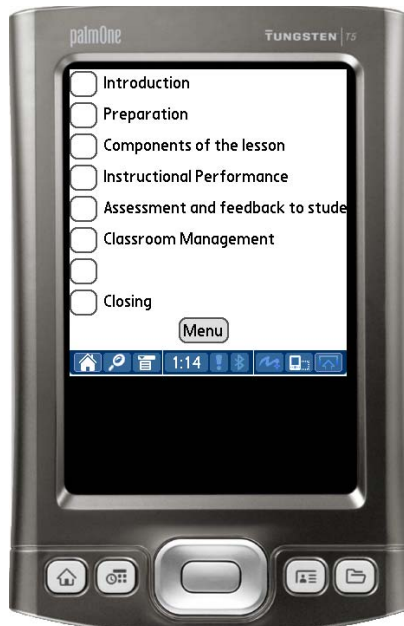
The user can record each information item on the initial screen directly via graffiti or keyboard emulator (left illustration) or select from a downloaded pop-up list (right illustration). See the earlier section on list maintenance for details.



The navigation icons shown below allow easy movement within the current observation.



The middle **DOWN ARROW** button  causes the screen below to appear and allows the user to navigate quickly to any part of the current observation or evaluation.

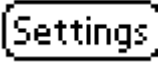


The user should tap the square adjacent to the desired part of the observation.

The **Menu** button returns to the top level screen for *The Administrative Observer*. At this top level screen, users can activate the NEW, OPEN, COPY, DELETE, DELETE, PWD, and EXIT functions described earlier in this manual.



The user can also use the left or right navigation buttons shown above to move backwards or forwards through the parts of the observation.

The **SETTINGS** button  allows the user to change basic program settings just like the desktop part of the program.



Adjustment of these preference settings is described in detail elsewhere in this manual. Their content can be changed for any job appraisal done on the handheld by clicking the desired button. Changes will be effective for the current job appraisal only and will not affect the user's desktop defaults.

Pressing **REPORT \ TITLE CHOICES** will reveal the following screen.



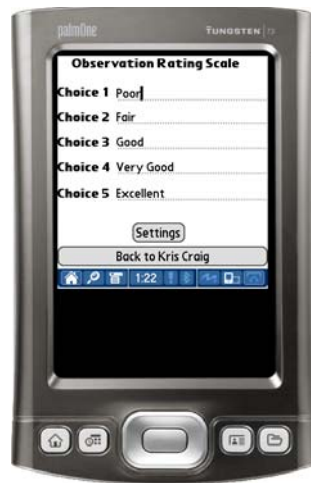
The user can change any displayed option. Keep in mind these are **titles** of sections, not the actual content of the section.

Pressing **OBSERVER INFORMATION** will reveal the following screen.



As with other screens in the **SETTINGS** area, the user can adjust any displayed information. The changes will affect only the current observation, not the basic downloaded preferences.

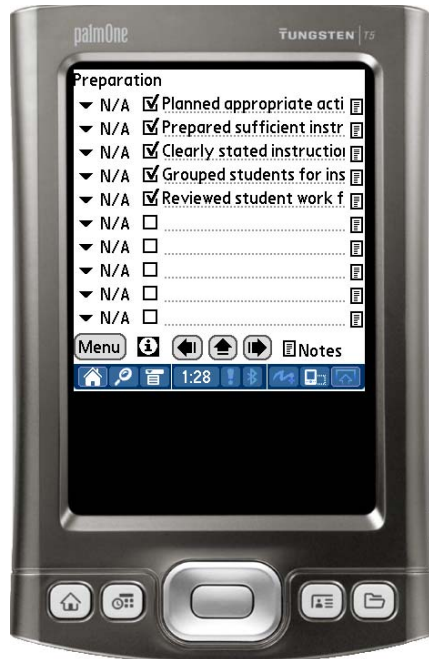
Pressing **OBSERVATION RATING SCALE** will reveal the following screen.



The full text of the observation rating scale is shown and may be changed. It is important to note that the drop down box that appears when the program is in use may display shortened or truncated descriptors because of limited screen space. The actual descriptors entered at this screen by the user will appear when the completed appraisal is uploaded to the desktop PC.

## Data Entry

The screen below illustrates the five parts of every data entry screen that concern the user when using *The Administrative Observer* on a Palm device.



The five parts of each data entry screen are

1. the Quality Indicator checkbox,
2. the Rating Scale drop down box,
3. the Quality Indicator text display,
4. the Quality Indicator text modification toggle, and
5. the Observation Notes text toggle.

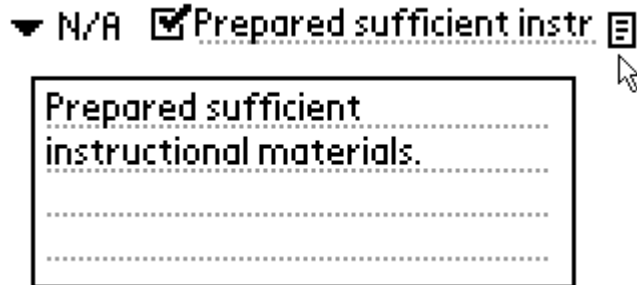
The **Quality Indicator checkbox**  allows the user to turn on and to turn off any quality indicator desired. A check in this box means the quality indicator is active and will be reflected in the observation or evaluation document.


The **Rating Scale** drop down box allows the user to indicate how well a particular quality indicator was performed. Shortened indicators will appear in the drop down box, but the full text of the rating scale will appear in the uploaded and printed document.

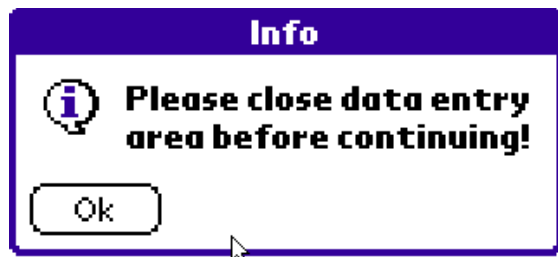


The **Quality Indicator text** displays the beginning portion of quality indicator. This will most often be enough for an experienced user to know the full text. However, there will be times when the user wishes to view or change the text of the quality indicator.

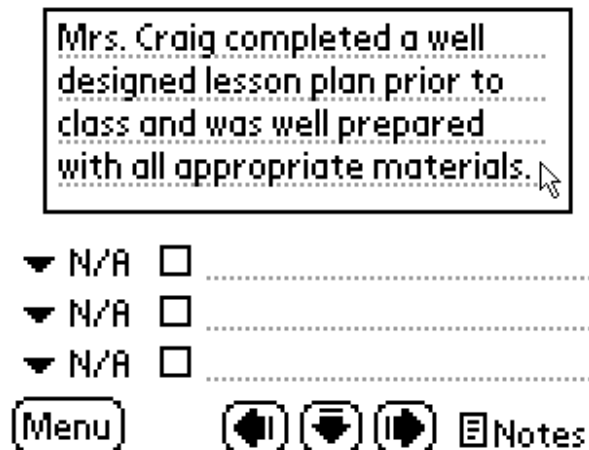
The **Quality Indicator modification toggle**  allows the user to view and change the text of each indicator. Text can be entered using graffiti or the keyboard emulator.



It is important to note that the user must press the toggle  again after viewing or modifying the quality indicator text. An error message will appear if the user tries to use another part of the program before closing the displayed text screen.



The **Observer Notes toggle** functions in a similar manner, but allows the user to append notes to the paragraph text of each tabbed area.



Again, the **Observer Notes toggle** must be pressed before leaving this screen. It is important to emphasize that these notes will be appended to the paragraph text of each tabbed observation section when uploaded to the desktop software for viewing, editing, or printing.

The **CLOSING** tab does not contain the same components as the other data entry screens on the handheld.



Text for the Commendations and the Recommendations can be entered directly using graffiti or the keyboard emulator. Users more comfortable with the desktop PC keyboard can complete these sections after uploading to the desktop by editing the uploaded file prior to generating the feedback report to the teacher.

#### Optional use of the NOTES toggle.

The user may elect to enter **NOTES** at each tabbed data entry screen. **NOTES** are meant to be somewhat brief, a couple of sentences as opposed to an essay. Several possibilities exist.

If **NOTES** are not entered on the Palm handheld, the paragraph text of the desktop preferences will appear unaltered.

If **NOTES** are entered, and if **no** paragraph exists on the desktop preferences, the NOTES will appear in the place of the missing paragraph.

If **NOTES** **are** entered, and if the desktop preferences do contain paragraph text, the NOTES will be appended to the end of that text. This is the most likely situation the user will encounter.

## Using Templates on the Palm Handheld

Templates can be particularly useful on handheld devices. Without templates, the user will have to download fresh preferences whenever the job category of the person being observed or evaluated changes. With templates, however, evaluations of many different individuals with different job categories is possible.

To create and use templates on the handheld, the user must prepare preferences for each desired job category on the PC desktop.

**Illustration:** A template for an elementary school teacher will be created. These same steps would be used to create a template for any job category

- From the desktop menu bar, choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School**.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Download the preferences to your handheld device.
- On the handheld, open a new observation. Instead of person's name, enter the name Template Elementary. Click **SAVE** without completing any part of the data entry.
- Repeat the process for every job category you might use frequently.

**IMPORTANT:** Copy the template. Use the copy. Treat your template as you would a master document that is always copied but never used.

To use the template as a starting point for an observation of Alice Johnson, for example, highlight the name of the desired template and use the **COPY** feature to create a second file named "Alice Johnson."

Some handheld users find having a series of templates on the device to be more efficient than downloading preferences each time evaluations for a new job category are begun.

Always treat your template as a read-only master document. Copy the template. Use the copy.

## Walkthrough Observations using a Palm handheld device

The purpose of the handheld version of **The Administrative Observer** is to increase convenience for users, a purpose readily achieved when the program is used for brief observation visits commonly known as “walkthroughs.”

The recommended technique for using **The Administrative Observer** for walkthroughs involves

- Creating a set of “walkthrough” preferences, typically using just one or two tabs with a smaller set of quality indicators
- Downloading the walk through preferences to the handheld
- Using the walk through preferences on the handheld to record your observations
- Uploading the walkthrough observation to the desktop version for final editing and printing.

An example of walkthrough preferences used to rate the observed teacher on each quality indicator is shown below on left.



Another method for recording a walkthrough observation is to use a blank rating (replace “POOR” with a blank, for example), then simply activate the checkmark only for behaviors observed. This alternative is shown in the illustration above on right.

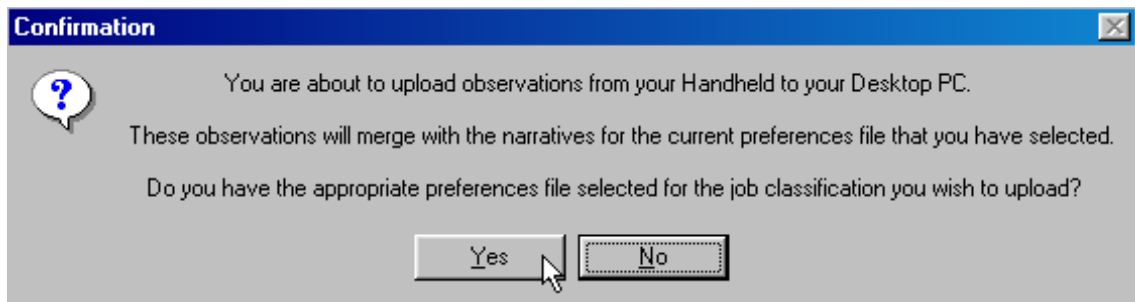
## Uploading an observation or evaluation

Completed or partially completed observation and evaluation files can be uploaded to the desktop module of **The Administrative Observer** for viewing, editing, printing, or archiving.

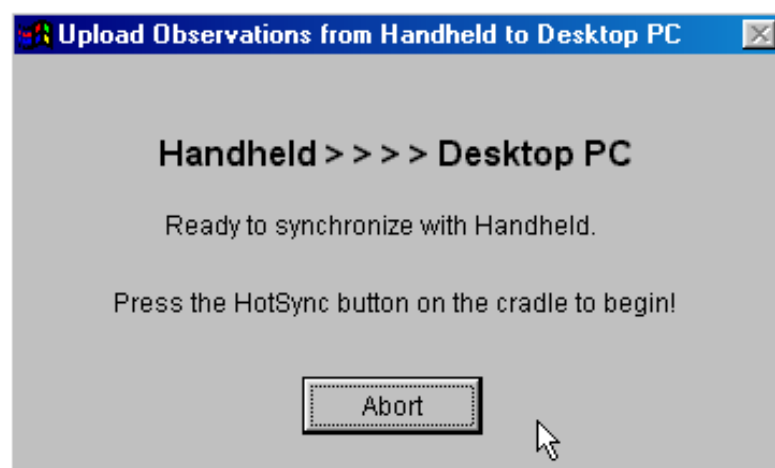
It is **important** for the active preferences on the desktop to match the preferences on the handheld if the desktop preferences contain any paragraph narrative. This is not important if you are concerned only with the checklist component.

The user can upload one or more files from the handheld during any upload operation. Following upload, the user can leave the file on the handheld or delete it. Deletion is recommended to regain space on the handheld. Once deleted from the handheld device, however, the files cannot be retrieved. Users are cautioned to be sure of successful upload prior to deleting files from the handheld.

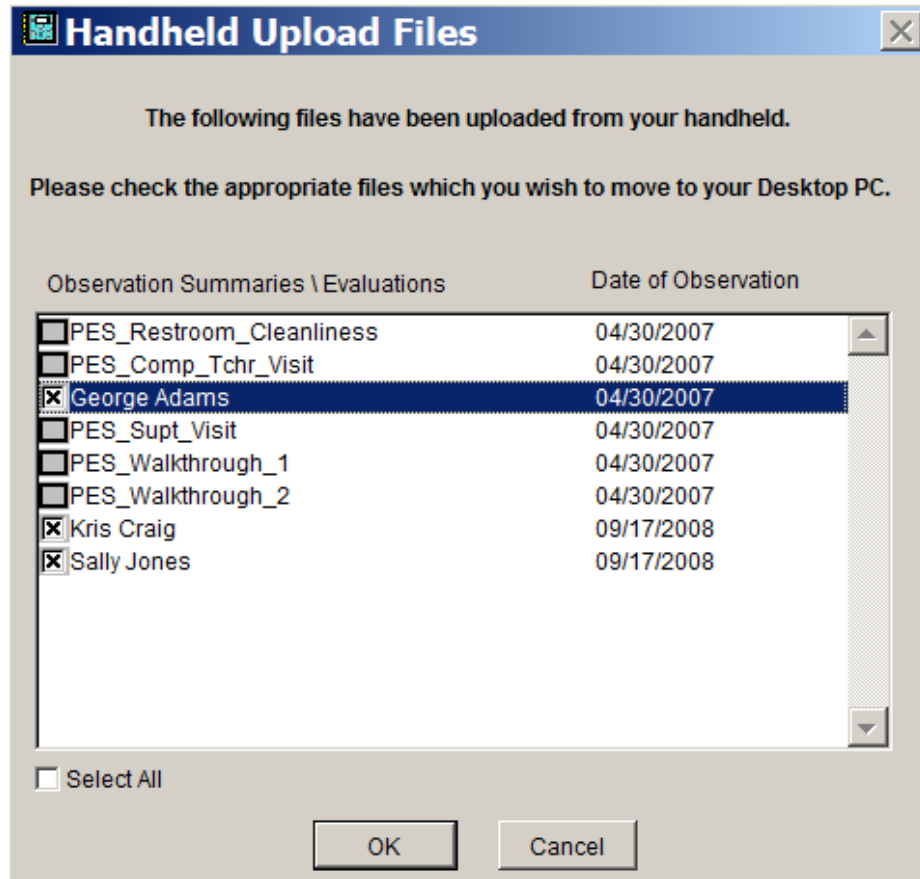
The user should select **PALM | UPLOAD OBSERVATIONS FROM HANDHELD TO DESKTOP PC** to begin the upload process. A cautionary dialogue will appear to verify that the user's preferences on the desktop match the type of work being uploaded.



The user should click the **YES** button to begin the upload. The HOTSYNC dialogue will appear. The user should then activate the HOTSYNC process to begin the upload.



All the observation and evaluation files on the user's handheld will be uploaded to the desktop software. The following dialogue will appear.



The user will most likely wish to move only some of these files to the desktop and should click the checkbox beside the file names of those to be moved.

Especially if the upload moved more than one type of employee, the user should be careful to click the checkbox of only those files consistent with the current active preferences. From the illustration above, one file is for a teacher while the other is for a custodian. The active desktop preferences will determine which uploaded files the user should select.

Users who mistakenly mismatch files when uploading can recover by changing the desktop preferences to match the desired upload and performing the upload a second time. For example, a user who uploads a custodian evaluation when secretarial preferences are active can recover by changing the desktop preferences and uploading the custodial evaluation a second time.

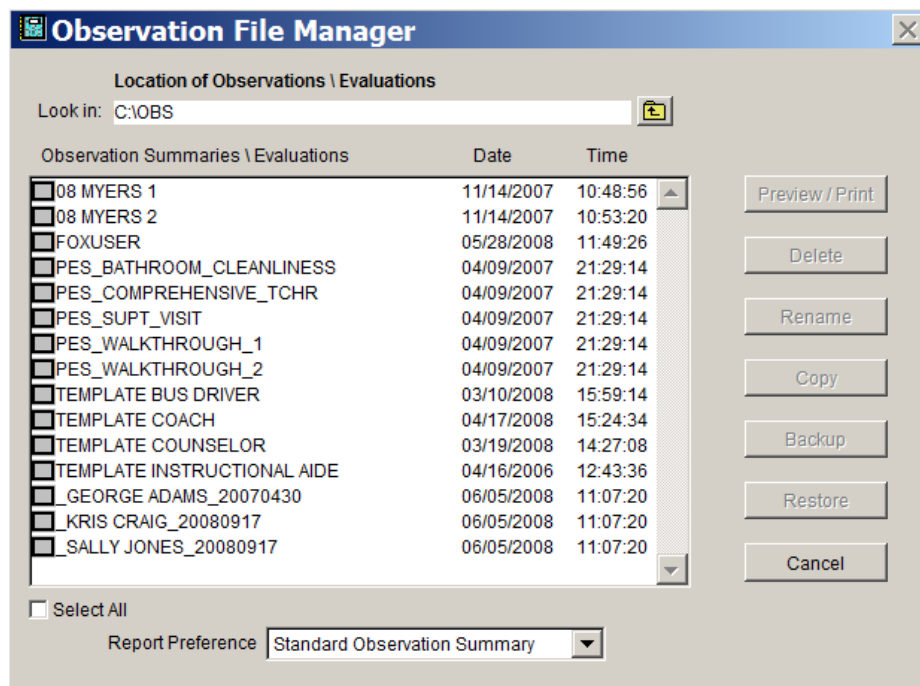
## Working with Uploaded Files

Once uploaded to the PC desktop, files begun on the handheld can be viewed, edited, printed, or archived like any file begun on **The Administrative Observer**.

Three steps are recommended following upload from the handheld.

- Rename the file according to the district's approved file naming protocol.
- Open the file to validate its content or edit if necessary.
- Generate a feedback report to the employee.

To rename, the user should click **FILE | OBSERVATION FILE MANAGER** to activate the Observation File Manager. The following dialogue will appear.



Uploaded files will always appear **at the bottom** of the file listing and will show the employee name followed by a series of numbers. The user should rename uploaded files according to the approved naming protocol.

As retrieved    \_GEORGE ADAMS\_20070430  
-----  
As renamed    11 Adams 1

In the example above, the renaming protocol has three parts.

|                        |   |       |                                   |
|------------------------|---|-------|-----------------------------------|
| Fiscal Year            | = | FY11  | <b><u>Resultant File Name</u></b> |
| Teacher last name      | = | Adams | 11 Adams 1                        |
| serial number of visit | = | 1     |                                   |

After renaming, the user should click **CANCEL** to exit the observation file manager.

To open the file to validate or edit its contents, the user should click **FILE | OPEN** and select the uploaded file as renamed. Review and adjust the content of the file as desired using the procedures detailed earlier in this manual. Following revision, save the edited file.

To generate feedback to the observed employee, the user should click **REPORTS | OBSERVATION REPORTS** and follow the logical prompts. The procedure for report creation is detailed in earlier parts of this manual.

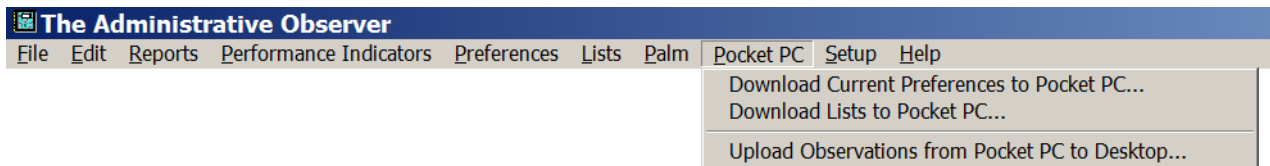
## The Administrative Observer on Pocket PC/Windows Mobile handhelds

*The Administrative Observer* allows data entry at your convenience using a Pocket PC handheld computer. Whether used while observing the employee or later while away from the desktop PC, the handheld module greatly increases the convenience of data entry.

Software to install *The Administrative Observer* on Pocket PC handheld computers can be activated from the Windows **START** menu on your desktop PC after the core standard edition desktop program has been installed from CD and updated to the most current version from the website ([www.pes-sports.com](http://www.pes-sports.com)).

A separate license fee is required for the handheld feature. Contact the publisher to obtain a license and activate the handheld module. E-mail contact information for this purpose is given on the title page to this manual. It can also be found on the handheld screen which prompts the user to enter an unlock activation code.

In general terms, installation and operation of *The Administrative Observer* is virtually identical on the Palm and the Pocket PC. The desktop menu bar has separate but identical dropdown menus for the Palm and for the Pocket PC.



There are, however, small differences in process for each device. For this reason, separate sections of this manual will describe installation, activation, and operation on each handheld type.

## Supported Handheld Devices

|                      |   |
|----------------------|---|
| Blackberry           | <p>Most models including ...<br/>Curve, Bold, Tour, Pearl, World Edition and Storm</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - 4.2.1 or later</p>              |
| iPhone               | <p>All generations of iPhone, iPod Touch, and iPad</p> <p>Utilizes <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Windows<br>Mobile    | <p>Most handhelds including ...<br/>HP iPaq series, Dell Axim series, Treo series</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Windows Mobile 2003 or later</p> |
| Android              | <p>Most models utilizing Mobile Web version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>  |
| Palm                 | <p>Most models including Tungsten, TX, Centro, Treo series</p> <p>Palm Pre/Pixi utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Palm OS 3.5 or later</p>                              |
| Other<br>smartphones | <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |

## Installing *The Administrative Observer* on a Windows Mobile handheld

Note: The ActiveSync software (supplied by Microsoft) and The Administrative Observer desktop software (from CD) must be installed before attempting handheld installation.

The installation requires five sequential steps to make *The Administrative Observer* operational on the user's handheld computer.

1. Installation of the Pocket PC conduit
2. Installation of *The Administrative Observer* on the Pocket PC device
3. Activation of *The Administrative Observer* on the Pocket PC device
4. Installation of user preferences on the handheld device via activesync
5. Installation of available pop-up lists on the handheld device via activesync

### Step #1 Installing the Windows Mobile (Pocket PC) conduit

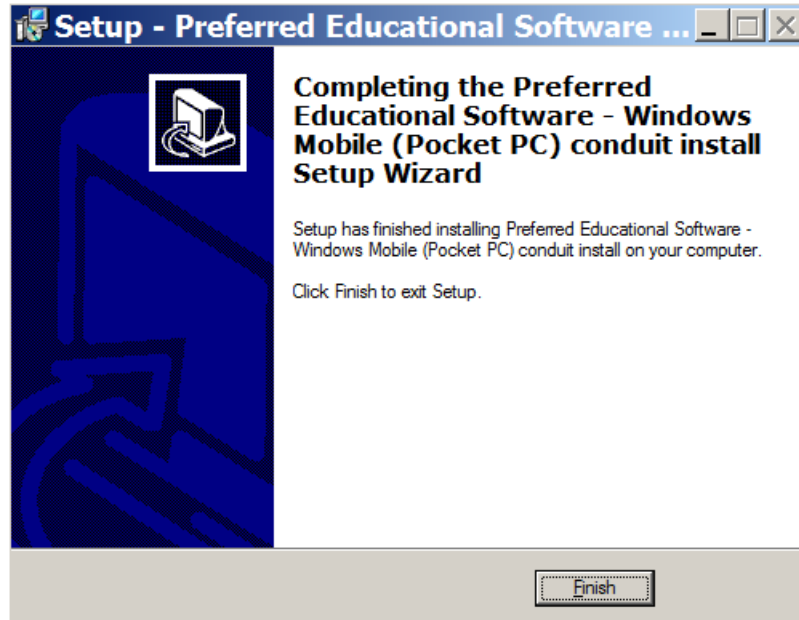
Users should verify that the handheld device connects properly with the desktop PC and syncs via activesync before installing any part of *The Administrative Observer* for the handheld.

Close all other applications. Select **Start Menu | Programs | The Administrative Observer | Install Pocket PC Conduit**. An informational dialogue will appear.



Click the **Next** button to continue. Accept the prompts as presented to complete the installation of the Windows Mobile (Pocket PC) conduit for *The Administrative Observer*.

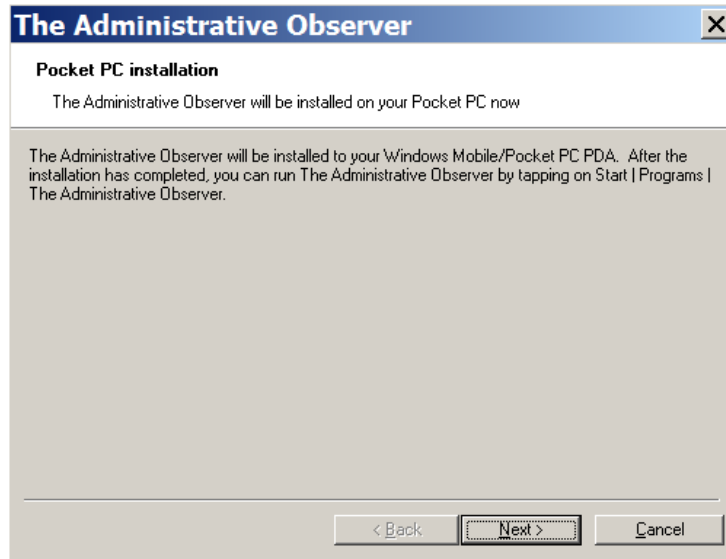
Click the **Finish** button when the screen shown below appears.



After re-starting the computer, the user should connect the Windows Mobile (Pocket PC) device to the desktop computer. Activesync will begin. This will complete the installation of ***The Administrative Observer*** conduit on the handheld device.

**Step #2 Installing *The Administrative Observer* for Windows Mobile (Pocket PC).**

From the **Start Menu**, select **Start Menu | Programs | The Administrative Observer | Install Observer on Pocket PC**. An informational dialogue will appear.



Click the **NEXT** button and accept the prompts as presented. When the installation is complete, the dialogue shown below will appear.



Follow any instructions that might be given on your handheld screen.

When finished, the dialogue shown below will appear on the handheld screen confirming that ***The Administrative Observer*** was installed successfully. Tap the **OK** button on the upper right-hand portion of the handheld screen.



After completing the above steps, ***The Administrative Observer*** will be installed on your Windows Mobile (Pocket PC) handheld.

**CAUTION:** this installation should be run only once. Each subsequent installation will

1. overwrite all existing observations on your handheld and
2. require the user to obtain a second registration code from technical support.

Using a shortcut to access ***The Administrative Observer*** for the Pocket PC handheld.

A shortcut to access ***The Administrative Observer*** should appear on the Windows Mobile **START** menu following installation. If this does not happen automatically, consult your IT department for guidance.

### **Step #3 Activating *The Administrative Observer* on the handheld device**

Run ***The Administrative Observer*** on your handheld by tapping its shortcut or by tapping **Start | Programs | The Administrative Observer**. The registration screen will appear the first time the program is run.



The user should tap the REGISTER icon to proceed to the registration code screen.



The user must contact Preferred Educational Software by e-mail at this point to obtain a registration code which will be entered only once. Please allow up to twenty-four hours to receive your activation unlock code.

## Password Protection for *The Administrative Observer* on handheld

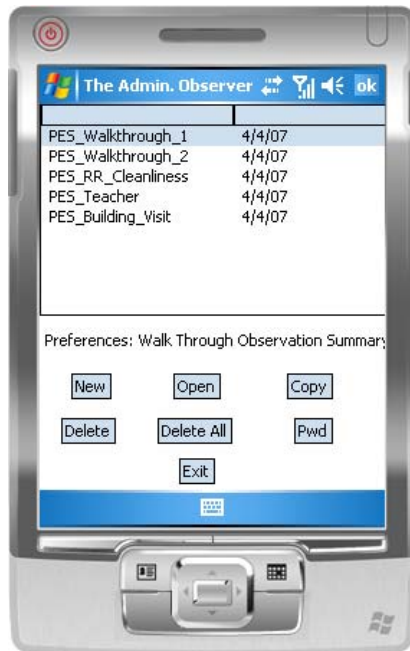
After the registration code unlocks *The Administrative Observer*, the **REGISTER** icon on the welcome screen will be replaced by an **OK** button. The user should tap the **OK** button with the stylus to advance to the password entry screen.



The password entry screen provides security to keep observation records or evaluations done on the handheld safe from unauthorized viewing or modification. Users are encouraged to create and use a password.



No password is active on first use, nor is one required. The first time user should leave the password line blank and press the **OK** button. The following screen will appear.



Users who choose to use a password should tap the **PWD** icon. The current password must be entered before a password change will be allowed. When creating a password for the first time, users will see the following screen on the handheld and should simply press the **OK** button without entering a password.



The user will be prompted to create a new password by the screen below.



The new password must be used for all subsequent sessions with ***The Administrative Observer*** on the handheld device.

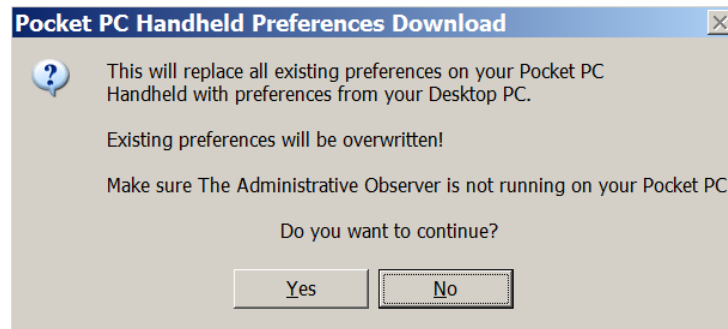
### **Forgotten passwords**

***The Administrative Observer*** cannot be accessed without a password after one has been created. Users who forget a password should contact Preferred Educational Software using the e-mail address shown on the title page of this manual.

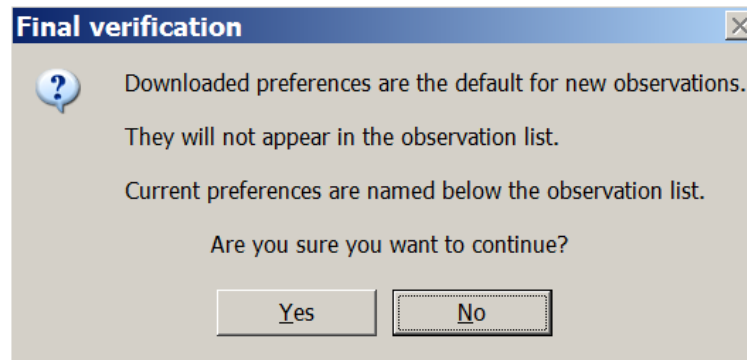
#### **Step #4 Installation of user preferences on Windows Mobile (Pocket PC) devices**

The user should select and edit default preferences for *The Administrative Observer* using the procedure described earlier in this manual. Those preferences will be downloaded via the activesync conduit for use on the handheld.

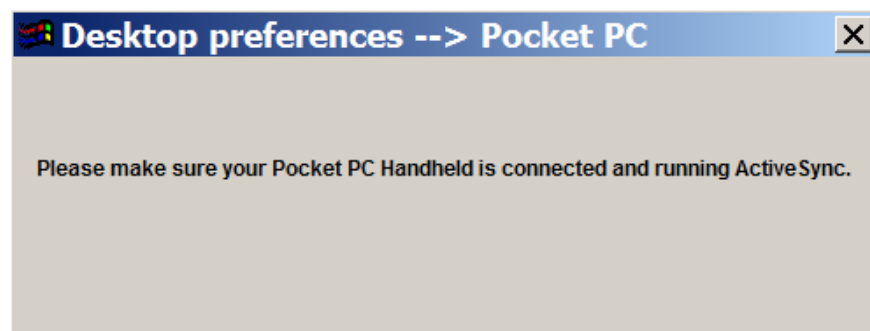
The user should select **POCKET PC | DOWNLOAD CURRENT PREFERENCES TO POCKET PC** from the menu bar. A cautionary dialogue will appear.



The user should click the **YES** button to download the current desktop preferences into the handheld device. A second cautionary dialogue will appear.



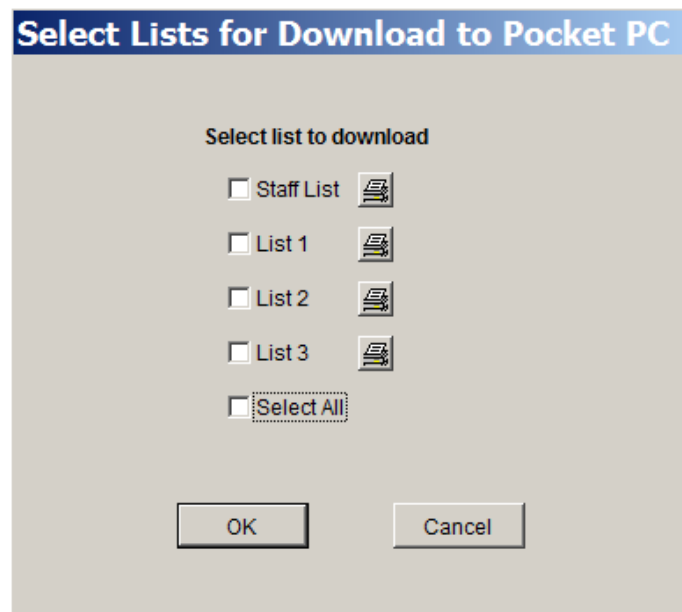
The user should verify that the handheld is connected to the desktop PC, then click the **YES** button here as well. The activesync dialogue will appear and the preferences will download to the Windows Mobile (Pocket PC) device.



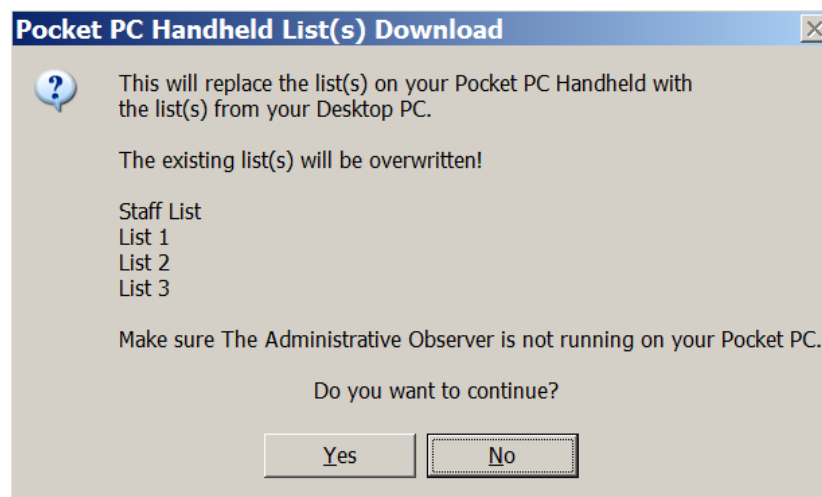
## **Step #5 Installation of pop-up lists on Windows Mobile (Pocket PC) devices**

Pop-up lists created for *The Administrative Observer* on the PC desktop can be downloaded via the activesync conduit for use on the handheld. See the earlier section detailing the process for establishing and populating pop-up lists.

The user should select **POCKET PC | DOWNLOAD LISTS TO POCKET PC** from the menu bar. The lists selection dialogue will appear.

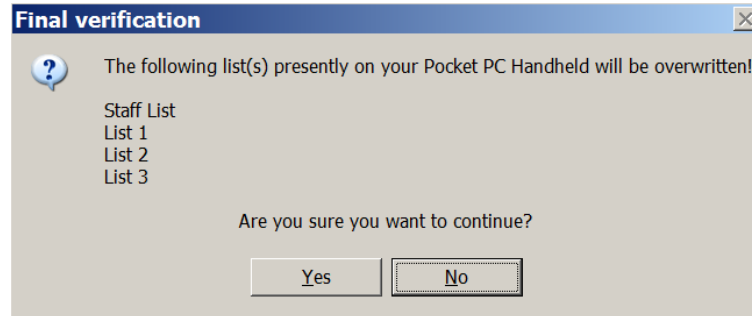


The user should indicate which lists are to be downloaded, then click **OK**. A cautionary dialogue will appear.

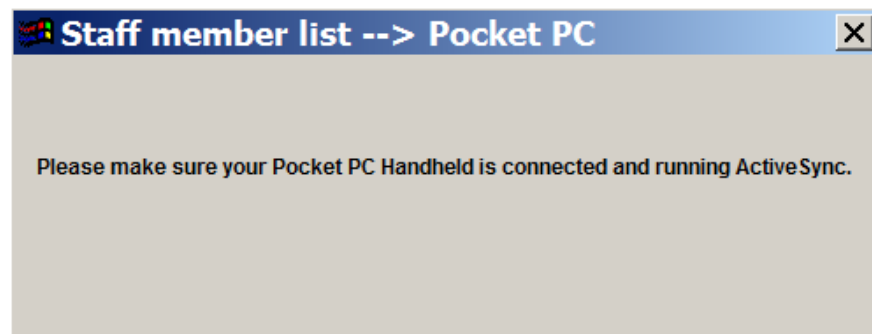


The user should click the **YES** button to download the selected pop-up lists to the handheld device.

A final cautionary dialogue will appear.



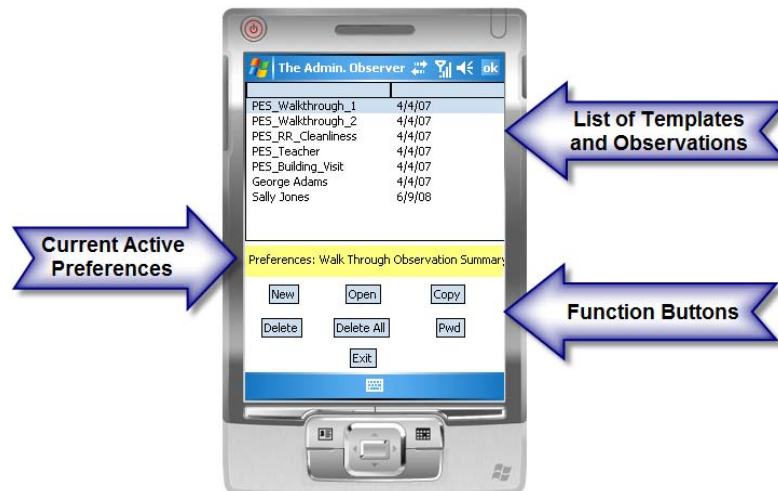
The user should verify that the handheld is connected to the desktop PC, then click the **YES** button here as well. The activesync dialogue will appear and the selected pop-up lists will download to the Windows Mobile (Pocket PC) device.



## Operation of *The Administrative Observer* on Pocket PC handhelds

### Overview

The initial handheld screen for *The Administrative Observer* is shown below. It is important to note that current preferences will always be shown in the middle of the screen as indicated below, not in the file listing.



The primary operational functions are indicated by the illustrated buttons.

**NEW** allows the user to create a new observation on the handheld. That observation will always reflect the most recent preferences downloaded from the desktop.

**OPEN** allows the user to complete or modify an observation or evaluation begun earlier.

**COPY** allows the user to copy a template to use as a starting point for a observation. This can be especially useful to avoid frequent downloading of preferences.

Example. A user could download preferences to evaluate custodians and use them to create a NEW file on the handheld entitled CUSTODIAN TEMPLATE. The user could then download preferences to record teacher observations and use them to create a NEW file on the handheld entitled TEACHER TEMPLATE.

With templates on the handheld, downloading from the desktop is not needed unless major changes to the default preferences were made. A user would **COPY** the custodian template and give it a new name such as TOM SMITH. Similarly, a user would **COPY** the teacher template and give it a new name such a SALLY JONES. While there can be only one set of preferences active to create new files on the handheld, there can be many template files that allow shifting between preferences using the **COPY** function.

**DELETE** allows the user to delete work done on the handheld when it is no longer needed. This is typically done after the observation or evaluation files are uploaded to the desktop unit for final editing, printing, and archiving.

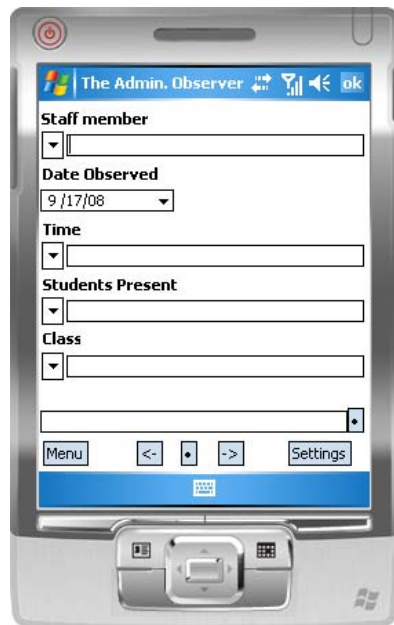
**DELETE ALL** allows the user to delete all files on the handheld at once. Use this function with caution. Deleted files on the handheld **cannot** be recovered.

**PWD** allows the user to create or change passwords to prevent unauthorized viewing or modification of observation or evaluation files on your handheld.

**EXIT** allows the user to exit *The Administrative Observer* gracefully. To prevent possible data loss, users are encouraged always to use the **EXIT** button.

## Creating a **NEW** observation or evaluation on the handheld

Pressing the **NEW** button will cause the following screen to appear.



The user is required to enter a staff member name at the prompt. No other function will be allowed until a name is entered at this screen. The staff member name will be recorded as the file name on your handheld.


After entering a name at the staff member prompt, the user will be able to complete data entry for this first screen or to switch between all other data entry screens for this observation.

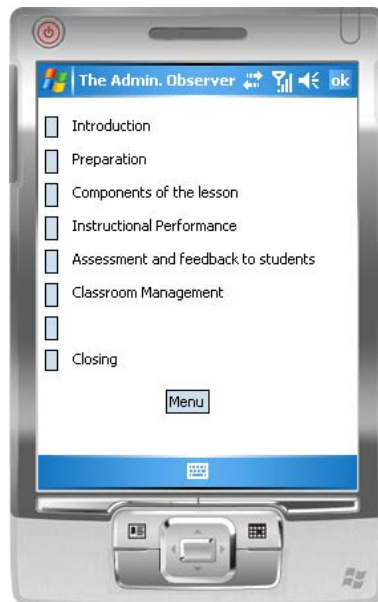
The user can record each information item on the initial screen directly via graffiti or keyboard emulator (left illustration) or select from a downloaded pop-up list (right illustration). See the earlier section on list maintenance for details.



The navigation icons shown below allow easy movement within the current observation.



The middle **navigation** button  causes the screen below to appear and allows the user to navigate quickly to any part of the current observation or evaluation.




The user should tap the square adjacent to the desired part of the observation.

The **Menu** button returns to the top level screen for *The Administrative Observer*. At this top level screen, users can activate the NEW, OPEN, COPY, DELETE, DELETE, PWD, and EXIT functions described earlier in this manual.



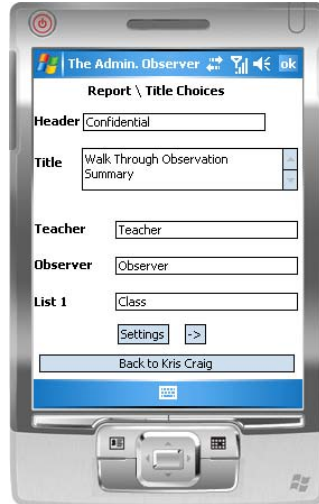
The user can also use the left or right navigation icons shown above to move backwards or forwards through the parts of the observation.

The **SETTINGS** button  allows the user to change basic program settings just like the desktop part of the program.



Adjustment of these preference settings is described in detail elsewhere in this manual. Their content can be changed for any job appraisal done on the handheld by clicking the desired button. Changes will be effective for the current job appraisal only and will not affect the user's desktop defaults.

Pressing **REPORT \ TITLE CHOICES** will reveal the following screen.



The user can change any displayed option. Keep in mind these are **titles** of sections, not the actual content of the section.

Pressing **OBSERVER INFORMATION** will reveal the following screen.



As with other screens in the **SETTINGS** area, the user can adjust any displayed information. The changes will affect only the current observation, not the basic downloaded preferences.

Pressing **OBSERVATION RATING SCALE** will reveal the following screen.



The full text of the observation rating scale is shown and may be changed. It is important to note that the drop down box that appears when the program is in use may display shortened or truncated descriptors because of limited screen space. The actual descriptors entered at this screen by the user will appear when the completed appraisal is uploaded to the desktop PC.

## Data Entry

The screen below illustrates the five parts of every data entry screen when using **The Administrative Observer** on a Windows Mobile (Pocket PC) device.



The five parts of each data entry screen are

1. the Quality Indicator checkbox,
2. the Rating Scale drop down box,
3. the Quality Indicator text display,
4. the Quality Indicator text modification toggle, and
5. the Observation Notes text toggle.

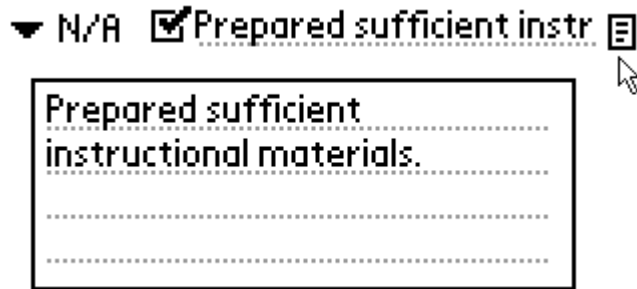
The **Quality Indicator checkbox**  allows the user to turn on and to turn off any quality indicator desired. A check in this box means the quality indicator is active and will be reflected in the observation or evaluation document.


The **Rating Scale** drop down box allows the user to indicate how well a particular quality indicator was performed. Shortened indicators will appear in the drop down box, but the full text of the rating scale will appear in the uploaded and printed document.



The **Quality Indicator text** displays the beginning portion of quality indicator. This will most often be enough for an experienced user to know the full text. However, there will be times when the user wishes to view or change the text of the quality indicator.

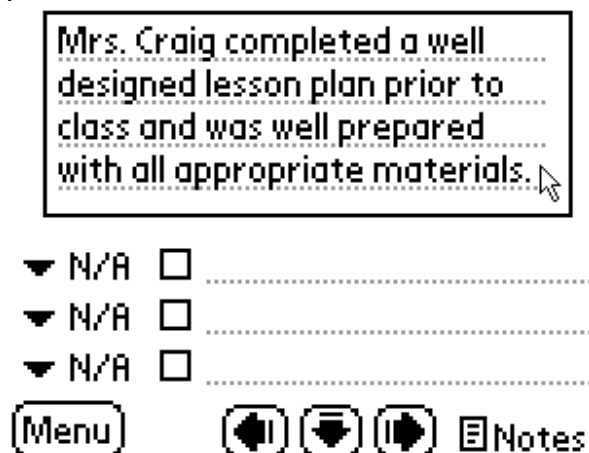
The **Quality Indicator modification toggle**  allows the user to view and change the text of each indicator. Text can be entered using graffiti or the keyboard emulator.



It is important to note that the user must press the toggle  again after viewing or modifying the quality indicator text. An error message will appear if the user tries to use another part of the program before closing the displayed text screen.



The **Observer Notes toggle** functions in a similar manner, but allows the user to append notes to the paragraph text of each tabbed area.



Again, the **Observer Notes toggle** must be pressed before leaving this screen. It is important to emphasize that these notes will be appended to the paragraph text of each tabbed observation section when uploaded to the desktop software for viewing, editing, or printing.

The **CLOSING** tab does not contain the same components as the other data entry screens on the handheld.



Text for the Commendations and the Recommendations can be entered directly using graffiti or the keyboard emulator. Users more comfortable with the desktop PC keyboard can complete these sections after uploading to the desktop by editing the uploaded file prior to generating the feedback report to the teacher.

#### Optional use of the NOTES toggle.

The user may elect to enter **NOTES** at each tabbed data entry screen. **NOTES** are meant to be somewhat brief, a couple of sentences as opposed to an essay. Several possibilities exist.

If **NOTES** are not entered on the Windows Mobile (Pocket PC) handheld, the paragraph text of the desktop preferences will appear unaltered.

If **NOTES** are entered, and if **no** paragraph exists on the desktop preferences, the NOTES will appear in the place of the missing paragraph.

If **NOTES** **are** entered, and if the desktop preferences do contain paragraph text, the NOTES will be appended to the end of that text. This is the most likely situation the user will encounter.

## Using Templates on the Windows Mobile (Pocket PC) Handheld

Templates can be particularly useful on handheld devices. Without templates, the user will have to download fresh preferences whenever the job category of the person being observed or evaluated changes. With templates, however, evaluations of many different individuals with different job categories is possible.

To create and use templates on the handheld, the user must prepare preferences for each desired job category on the PC desktop.

**Illustration:** A template for an elementary school teacher will be created. These same steps would be used to create a template for any job category

- From the desktop menu bar, choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School**.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Download the preferences to your handheld device.
- On the handheld, open a new observation. Instead of person's name, enter the name Template Elementary. Click **SAVE** without completing any part of the data entry.
- Repeat the process for every job category you might use frequently.

**IMPORTANT:** Copy the template. Use the copy. Treat your template as you would a master document that is always copied but never used.

To use the template as a starting point for an observation of Alice Johnson, for example, highlight the name of the desired template and use the **COPY** feature to create a second file named "Alice Johnson."

Some handheld users find having a series of templates on the device to be more efficient than downloading preferences each time evaluations for a new job category are begun.

Always treat your template as a read-only master document. Copy the template. Use the copy.

## Walkthrough Observations using a Windows Mobile (Pocket PC) handheld device

The purpose of the handheld version of **The Administrative Observer** is to increase convenience for users, a purpose readily achieved when the program is used for brief observation visits commonly known as “walkthroughs.”

The recommended technique for using **The Administrative Observer** for walkthroughs involves

- Creating a set of “walkthrough” preferences, typically using just one or two tabs with a smaller set of quality indicators
- Downloading the walk through preferences to the handheld
- Using the walk through preferences on the handheld to record your observations
- Uploading the walkthrough observation to the desktop version for final editing and printing.

An example of walkthrough preferences used to rate the observed teacher on each quality indicator is shown below on left.



Another method for recording a walkthrough observation is to use a blank rating (replace “POOR” with a blank, for example), then simply activate the checkmark only for behaviors observed. This alternative is shown in the illustration above on right.

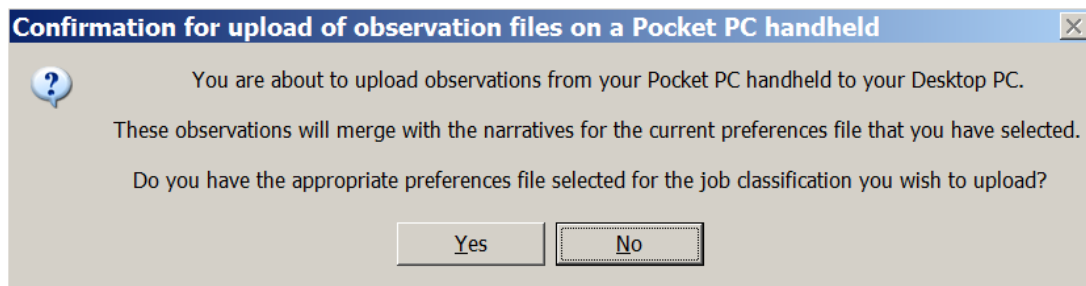
## Uploading an observation or evaluation

Completed or partially completed observation and evaluation files can be uploaded to the desktop module of **The Administrative Observer** for viewing, editing, printing, or archiving.

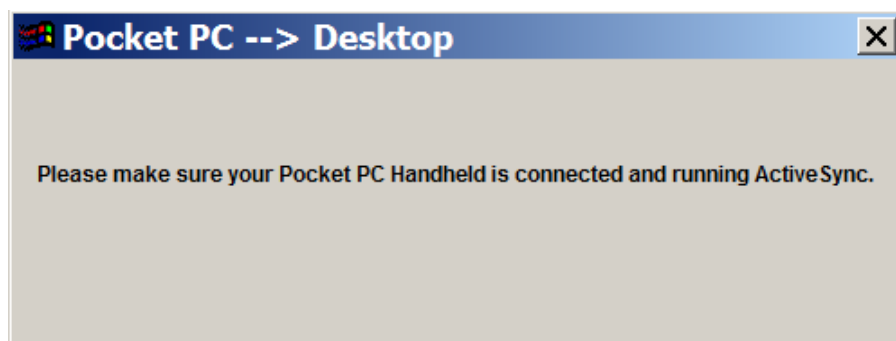
It is **important** for the active preferences on the desktop to match the preferences on the handheld if the desktop preferences contain any paragraph narrative. This is not important if you are concerned only with the checklist component.

The user can upload one or more files from the handheld during any upload operation. Following upload, the user can leave the file on the handheld or delete it. Deletion is recommended to regain space on the handheld. Once deleted from the handheld device, however, the files cannot be retrieved. Users are cautioned to be sure of successful upload prior to deleting files from the handheld.

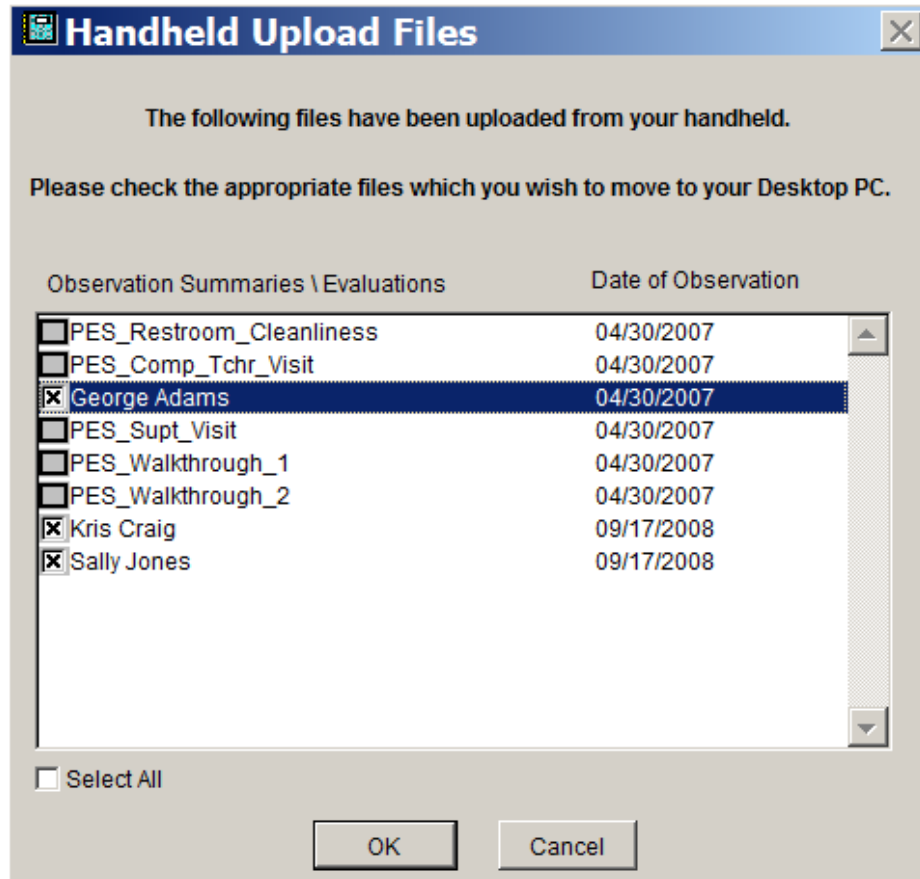
The user should select **POCKET PC | UPLOAD OBSERVATIONS FROM HANDHELD TO DESKTOP PC** to begin the upload process. A cautionary dialogue will appear to verify that the user's preferences on the desktop match the type of work being uploaded.



The user should verify that the Windows Mobile (Pocket PC) device is connected to the desktop PC, then click the **YES** button to begin the upload. The following dialogue will appear and the upload process will begin.



All the observation and evaluation files on the user's handheld will be uploaded to the desktop software. The following dialogue will appear.



The user will most likely wish to move only some of these files to the desktop and should click the checkbox beside the file names of those to be moved.

Especially if the upload moved more than one type of employee, the user should be careful to click the checkbox of only those files consistent with the current active preferences. From the illustration above, one file is for a teacher while the other is for a custodian. The active desktop preferences will determine which uploaded files the user should select.

Users who mistakenly mismatch files when uploading can recover by changing the desktop preferences to match the desired upload and performing the upload a second time. For example, a user who uploads a custodian evaluation when secretarial preferences are active can recover by changing the desktop preferences and uploading the custodial evaluation a second time.

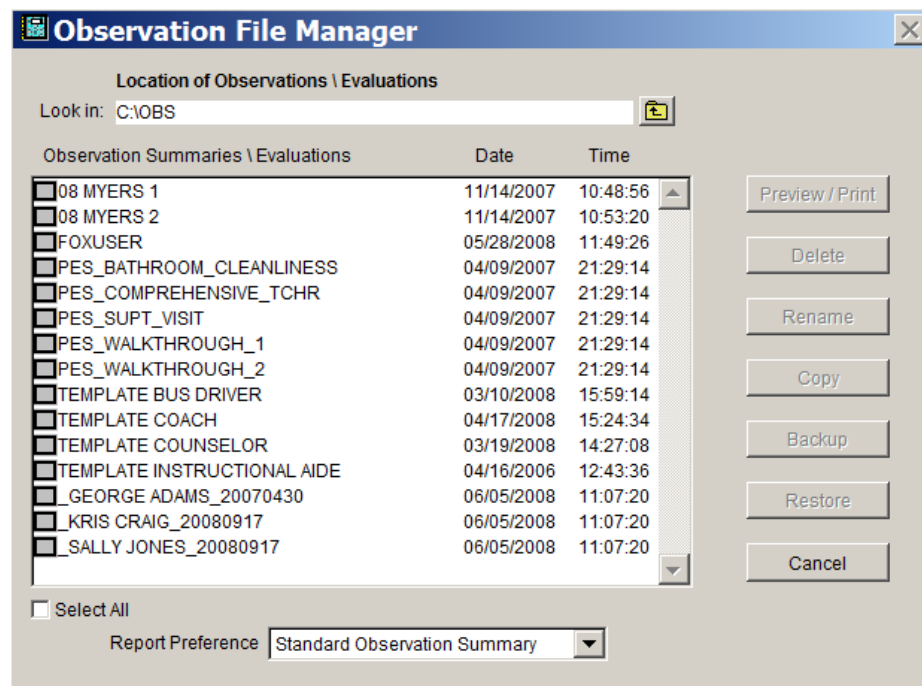
## Working with Uploaded Files

Once uploaded to the PC desktop, files begun on the handheld can be viewed, edited, printed, or archived like any file begun on **The Administrative Observer** desktop.

Three steps are recommended following upload from the handheld.

- Rename the file according to the district's approved file naming protocol.
- Open the file to validate its content or edit if necessary.
- Generate a feedback report to the employee.

To rename, the user should click **FILE | OBSERVATION FILE MANAGER** to activate the Observation File Manager. The following dialogue will appear.



Uploaded files will always appear **at the bottom** of the file listing and will show the employee name followed by a series of numbers. The user should rename uploaded files according to the approved naming protocol.

As retrieved    \_GEORGE ADAMS\_20070430  
-----  
As renamed    11 Adams 1

In the example above, the renaming protocol has three parts.

|                        |   |       |                                   |
|------------------------|---|-------|-----------------------------------|
| Fiscal Year            | = | FY11  | <b><u>Resultant File Name</u></b> |
| Teacher last name      | = | Adams | 11 Adams 1                        |
| serial number of visit | = | 1     |                                   |

After renaming, the user should click **CANCEL** to exit the observation file manager.

To open the file to validate or edit its contents, the user should click **FILE | OPEN** and select the uploaded file as renamed. Review and adjust the content of the file as desired using the procedures detailed earlier in this manual. Following revision, save the edited file.

To generate feedback to the observed employee, the user should click **REPORTS | OBSERVATION REPORTS** and follow the logical prompts. The procedure for report creation is detailed in earlier parts of this manual.

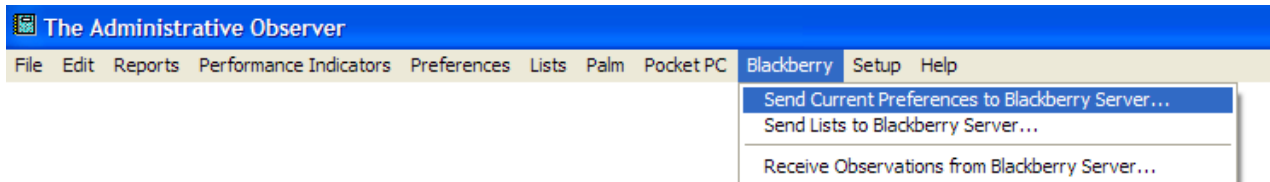
## The Administrative Observer on Blackberry handheld devices

**The Administrative Observer** allows data entry at your convenience using a Blackberry handheld computer. Whether used while observing the employee or later while away from the desktop PC, the handheld module greatly increases the convenience of data entry.

A separate license fee is required for the handheld feature. Contact the publisher to obtain a license and activate the handheld module. E-mail contact information for this purpose is given on the title page to this manual. It can also be found on the handheld screen which prompts the user to enter an unlock activation code.

Users should install the standard edition desktop program from CD and update to the most current version from the website ([www.pes-sports.com](http://www.pes-sports.com)) before installing the program on the Blackberry.

Operation of **The Administrative Observer** is conceptually parallel on all supported handheld devices. The desktop menu bar has separate but similar dropdown menus for each.



There are, however, interface differences specific to each device. For this reason, separate sections of this manual will describe installation, activation, and operation on each handheld type.

## Supported Handheld Devices

|                      |   |
|----------------------|---|
| Blackberry           | <p>Most models including ...<br/>Curve, Bold, Tour, Pearl, World Edition and Storm</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - 4.2.1 or later</p>              |
| iPhone               | <p>All generations of iPhone, iPod Touch, and iPad</p> <p>Utilizes <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Windows<br>Mobile    | <p>Most handhelds including ...<br/>HP iPaq series, Dell Axim series, Treo series</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Windows Mobile 2003 or later</p> |
| Android              | <p>Most models utilizing Mobile Web version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>  |
| Palm                 | <p>Most models including Tungsten, TX, Centro, Treo series<br/>Palm Pre/Pixi utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Palm OS 3.5 or later</p>                                 |
| Other<br>smartphones | <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |

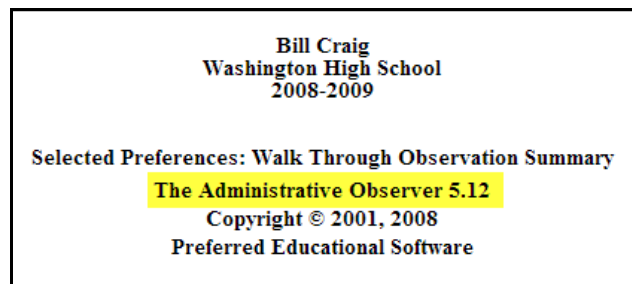
## **Installing *The Administrative Observer* on a Blackberry handheld**

The installation requires five sequential steps to make ***The Administrative Observer*** operational on the user's handheld computer.

1. Updating ***The Administrative Observer*** on the desktop PC.
2. Installation of ***The Administrative Observer*** on the Blackberry device
3. Activation of ***The Administrative Observer*** on the Blackberry device
4. Installation of user preferences on the Blackberry via the server
5. Installation of available pop-up lists on the Blackberry via the server

### **Step #1 Updating *The Administrative Observer* on the desktop PC.**

Use of the Blackberry handheld software requires an update to version 5.12 or better of the desktop software, is available from <http://www.pes-sports.com> . At that location, choose the link on the left for Downloads and Updates and follow the prompts.

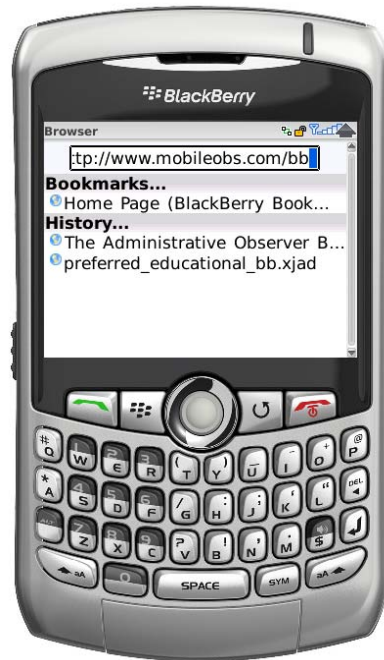


Following successful update, the version number shown in the middle of your screen will indicate version 5.12 or higher. Contact Preferred Educational Software if you have any difficulty updating your desktop software

## Step #2 Installing the handheld software on the Blackberry.

The Blackberry Edition software should be downloaded from our server using the web browser on your Blackberry device. Enter the web address below to obtain the Blackberry software. Check carefully for typing errors when entering this link.

<http://www.mobileobs.com/bb>



When prompted, accept the option to download the Blackberry Edition of The Administrative Observer.



A success dialogue will appear when the installation is complete. Accept the OK prompt. The main BlackBerry screen will then show The Administrative Observer icon in the upper left corner.



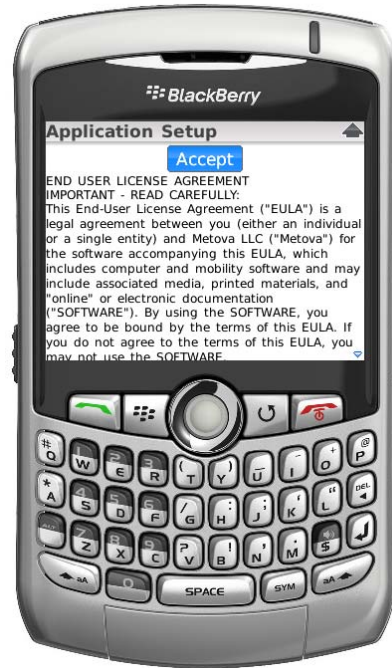
***The Administrative Observer*** is now installed on your BlackBerry handheld.

**Important Note:** installation should be run only once. Each subsequent installation will

1. overwrite all existing observations on your handheld and
2. require the user to obtain a second registration code from technical support.

### Step #3 Activating *The Administrative Observer* on the BlackBerry device

Highlight and click the “check mark” icon for *The Administrative Observer*. A license acceptance screen will appear the first time the software is run. Highlight and click the ACCEPT icon.



The ensuing screen will ask permission to test your device connections. Click the TEST icon to begin.



The subsequent screen will present your device ID and REGISTRATION prompt. VERY IMPORTANT - write down and store your device ID for future reference.



The device ID will be needed to setup your desktop software, allowing it to communicate wirelessly with your BlackBerry device via the server.

Additionally, you will need to email your device ID to Preferred Educational Software to obtain an unlock code which must be entered after you click the REGISTRATION icon.

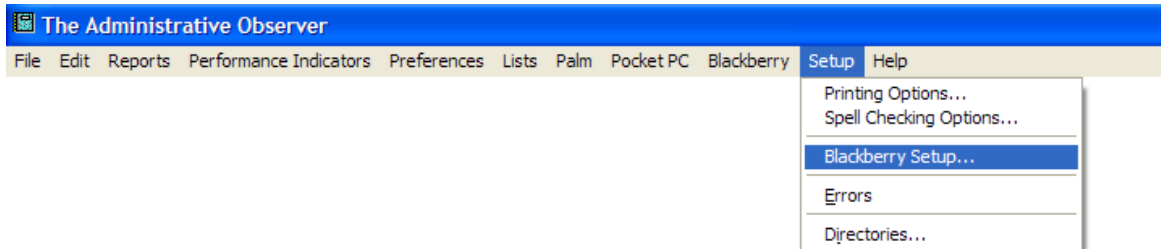
Email the device ID to [cotterk@pes-sports.com](mailto:cotterk@pes-sports.com) You will receive an unlock code within 24 hours.

Restart **The Administrative Observer** when you receive your unlock code, then click the REGISTRATION icon. The registration page will appear. Enter your code and click the REGISTER icon. A success dialogue will appear. Click the OK icon to advance to the main screen for The Administrative Observer BlackBerry Edition.

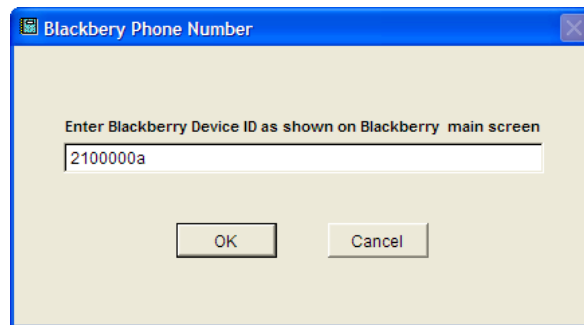


## Desktop Configuration

The desktop software works in partnership with the Blackberry software and must be configured to communicate with the device. Start **The Administrative Observer** on your desktop. Notice in the main menu bar the Blackberry menu and the Setup menu. Click the Setup menu and choose Blackberry Setup.



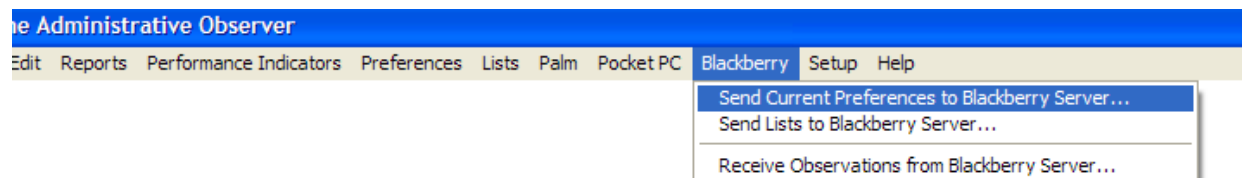
A configuration dialogue will appear. Enter your Blackberry device ID and click OK.



Your desktop software and your Blackberry are now operational and will be able to communicate wirelessly, allowing you to ...

- download your preferences from the desktop software to the Blackberry.
- download pop-up lists to the Blackberry.
- upload completed observations from the Blackberry to the desktop software.

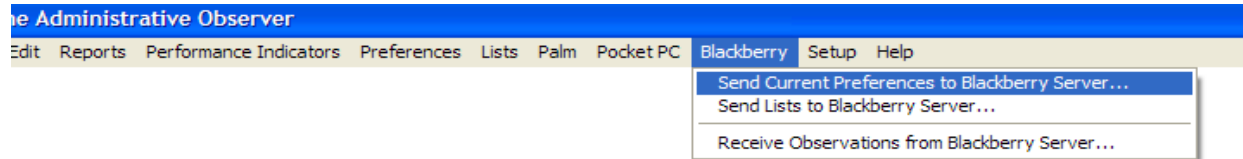
These functions are accessed via the Blackberry dropdown from the main menu bar as illustrated below.



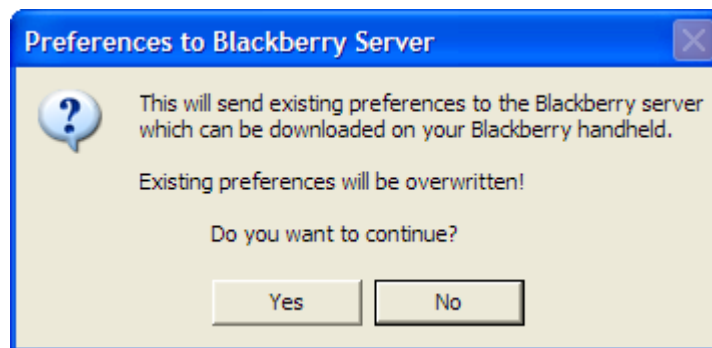
#### **Step #4 Installation of user preferences on Blackberry devices**

Preferences express the user's preferred starting point language. The user should select and edit default preferences for **The Administrative Observer** on the PC desktop using the procedure described earlier in this manual. Those preferences will be sent wirelessly via the Blackberry server for use on the handheld.

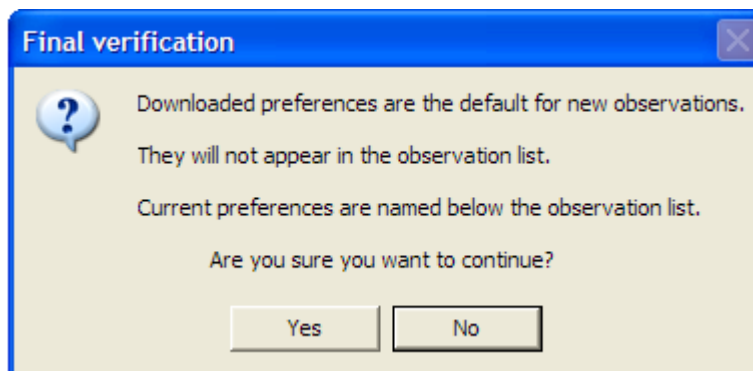
The user should select **BLACKBERRY | SEND CURRENT PREFERENCES TO BLACKBERRY SERVER** from the menu bar.



A cautionary dialogue will appear.

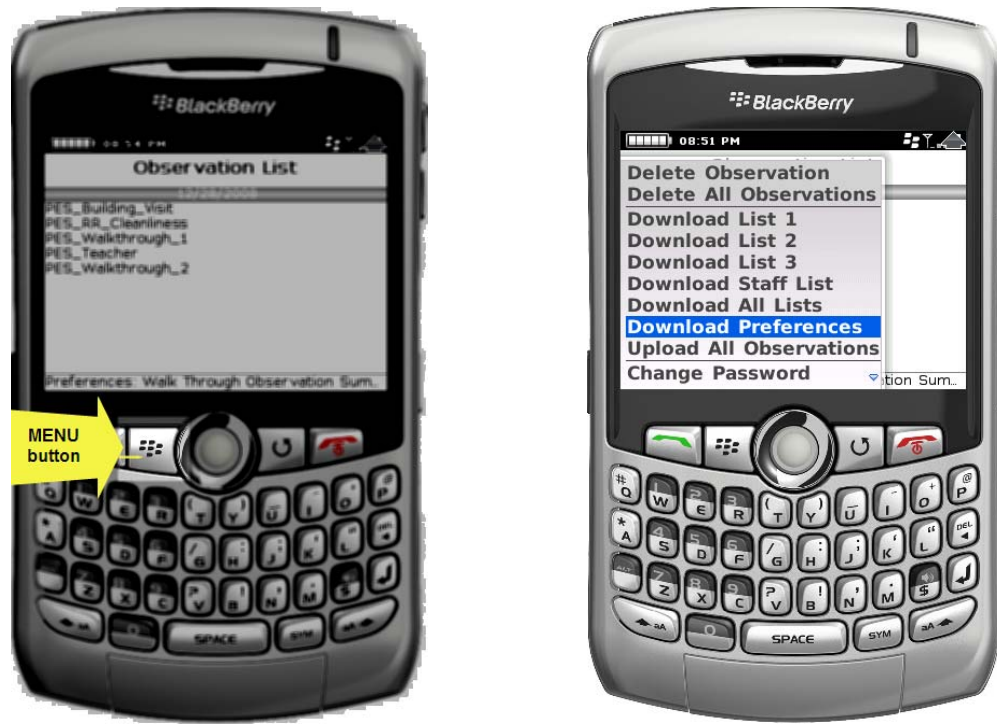


The user should click the **YES** button to **SEND** the current desktop preferences to the Blackberry server. A second cautionary dialogue will appear.



The user should click the **YES** button here as well. A dialogue will appear briefly indicating the preferences are being sent to the Blackberry server. They will now be available to the Blackberry device for download.

To complete the placement of user preferences onto the Blackberry, start The Administrative Observer on the Blackberry device. At the initial program screen, press the Blackberry menu button to reveal the ACTIONS menu.

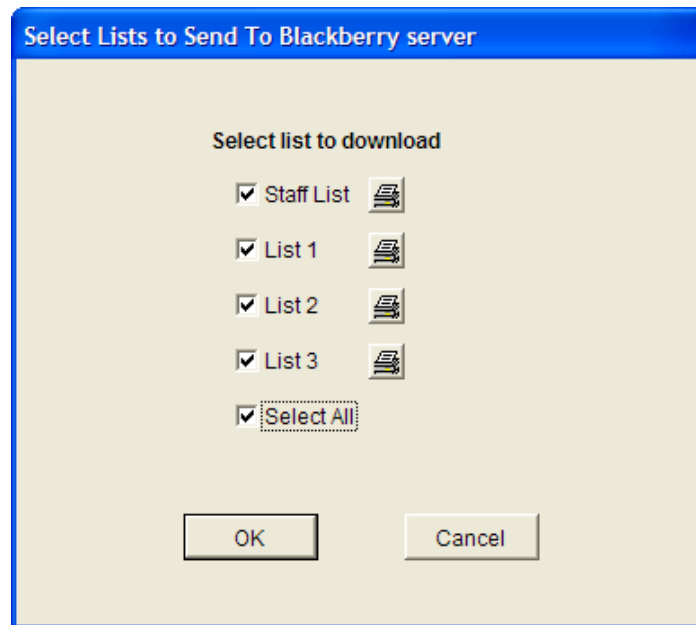


Highlight and click **DOWNLOAD PREFERENCES** to move your preferences to the Blackberry device. Your preferred starting point language will now appear for use each time you select **NEW OBSERVATION** from the Blackberry menu.

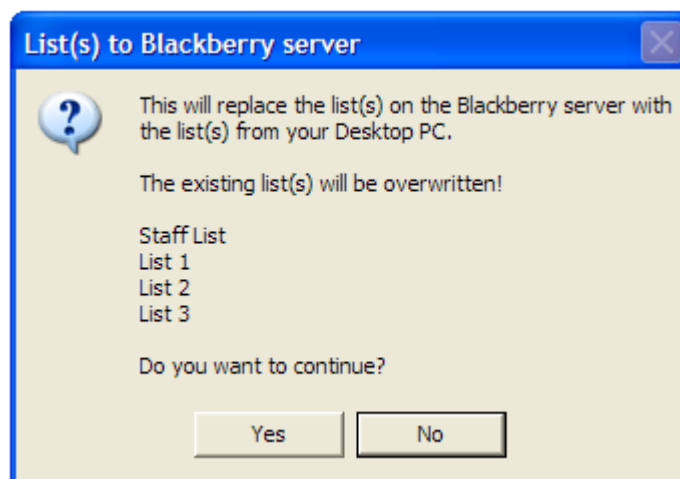
## Step #5 Installation of pop-up lists on Blackberry devices

Pop-up lists created for *The Administrative Observer* on the PC desktop can be sent via the Blackberry server for use on the handheld. See the earlier section detailing the process for establishing and populating pop-up lists.

The user should select **BLACKBERRY | DOWNLOAD LISTS TO BLACKBERRY** from the menu bar. The lists selection dialogue will appear.

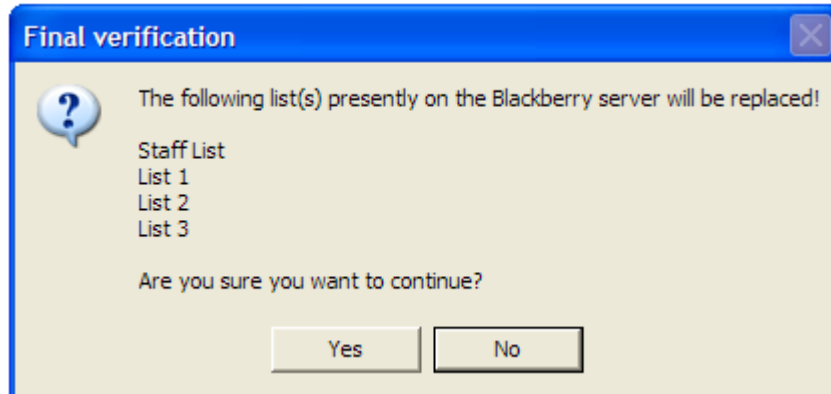


The user should indicate which lists are to be downloaded, then click **OK**. A cautionary dialogue will appear.



The user should click the **YES** button to proceed, recognizing that existing list(s) on the Blackberry server will be overwritten.

A final cautionary dialogue will appear.



The user should click the **YES** button here as well. A brief dialogue will appear as the selected pop-up lists are SENT to the Blackberry server.

To complete the placement of pop-up lists onto the Blackberry, start The Administrative Observer on the Blackberry device. At the initial program screen, press the Blackberry menu button to reveal the ACTIONS menu.



Highlight and click the appropriate option to **DOWNLOAD LIST** to move your list(s) to the Blackberry device. Your pop-up lists will be available for use each time you complete an observation on the Blackberry device.

## Operation of *The Administrative Observer* on Blackberry handhelds

### Overview

The initial handheld screen for *The Administrative Observer* is shown below. It is important to note that current preferences will always be shown at the bottom of the screen as illustrated below, not in the file listing.



The primary operational functions are accessed via the MENU button.

**NEW OBSERVATION** allows the user to create a new observation on the Blackberry. That observation will always reflect the active preferences downloaded from the desktop.

**OPEN OBSERVATION** allows the user to complete or modify an observation or evaluation begun earlier.

**COPY OBSERVATION** allows the user to copy a template to use as a starting point for a observation. This can be especially useful to avoid frequent downloading of preferences.

Example. A user could download preferences to evaluate custodians and use them to create a NEW file on the handheld entitled CUSTODIAN TEMPLATE. The user could then download preferences to record teacher observations and use them to create a NEW file on the handheld entitled TEACHER TEMPLATE.

With templates on the handheld, downloading from the desktop is not needed unless major changes to the default preferences were made. A user would **COPY** the custodian template and give it a new name such as TOM SMITH. Similarly, a user would **COPY** the teacher template and give it a new name such a SALLY JONES. While there can be only one set of preferences active to create new files on the handheld, there can be many template files that allow shifting between preferences using the **COPY** function.

**DELETE OBSERVATION** allows the user to delete work done on the handheld when it is no longer needed. This is typically done after the observation or evaluation files are uploaded to the desktop unit for final editing, printing, and archiving.

**DELETE ALL** allows the user to delete all files on the handheld at once. Use this function with caution. Deleted files on the handheld **cannot** be recovered.

**DOWNLOAD PREFERENCES** allows the user to retrieve preferences created and edited on the PC desktop and SENT to the Blackberry server.

**DOWNLOAD LISTS** allows the user to retrieve pop-up list(s) created and edited on the PC desktop and SENT to the Blackberry server.

**UPLOAD ALL OBSERVATIONS** allows the user to SEND completed observations to the Blackberry server for subsequent retrieval by the desktop software.

**CHANGE PASSWORD** allows the user to create or change passwords to prevent unauthorized viewing or modification of observation or evaluation files on your handheld.

***The Administrative Observer*** cannot be accessed without a password after one has been created. Users who forget a password should contact Preferred Educational Software at the e-mail address shown on the title page of this manual.

**CLOSE** allows the user to exit ***The Administrative Observer*** gracefully. To prevent possible data loss, users are encouraged always to use the **CLOSE** button.

Creating a **NEW** observation or evaluation on the Blackberry handheld

Selecting **NEW OBSERVATION** will cause the following screen to appear.



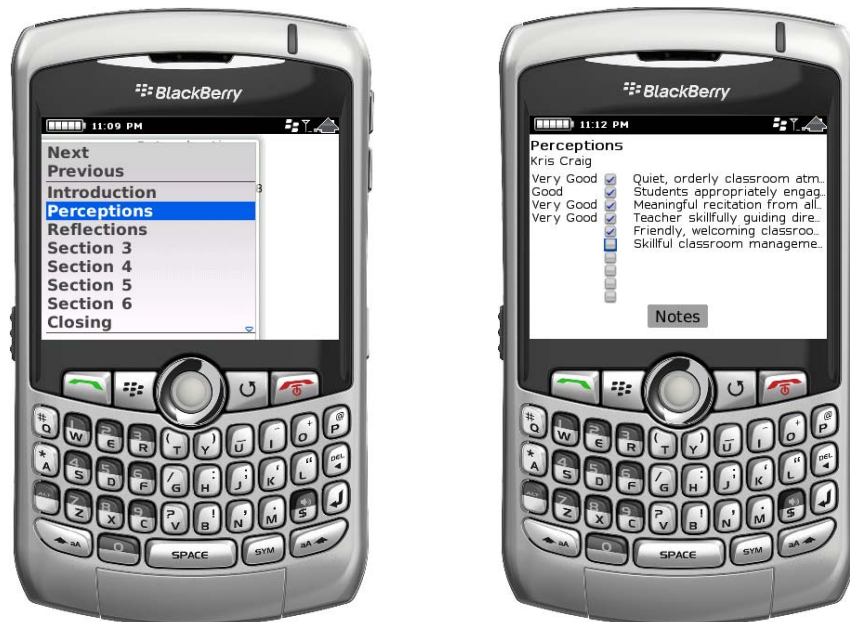
The user is required to enter a staff member name at the prompt either by direct typing or by selection from a downloaded pop-up list. No other function will be allowed until a name is entered at this screen. The staff member name will be recorded as the file name on your handheld.

After entering a name at the staff member prompt, the user will be able to complete data entry for this first screen or to switch between all other data entry screens for this observation.

The user can record each information item on the initial screen directly by typing or by selecting from a downloaded pop-up list (right illustration). See the earlier section on list maintenance for details.

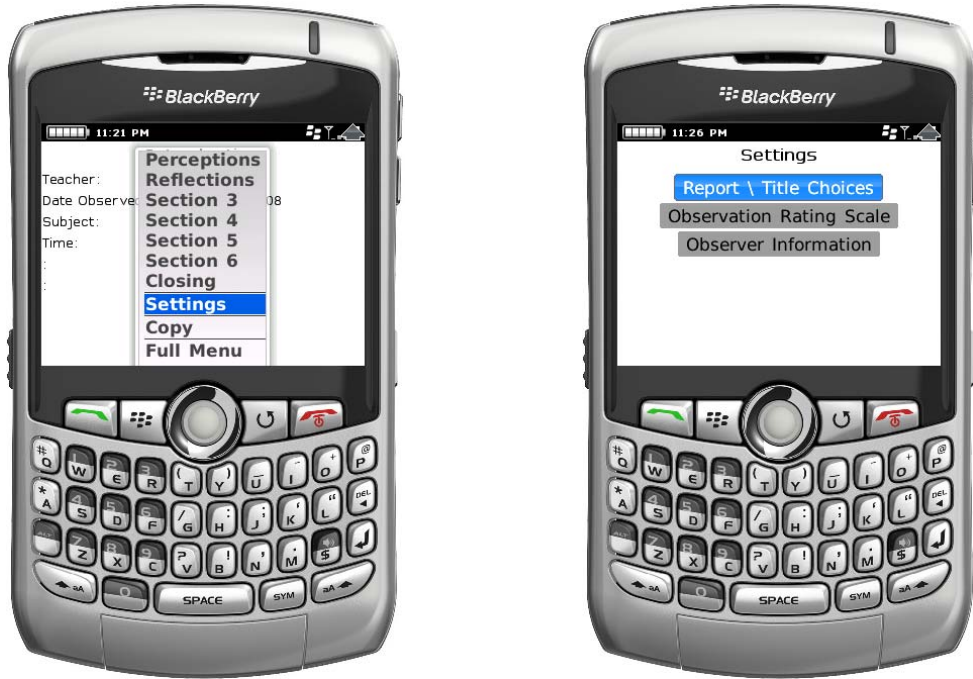


Following completion of the INTRODUCTION section, navigate to other sections within the current observation using the MENU button. Confirm your selection by clicking the Blackberry scroll wheel.



Data entry is accomplished by using the scroll wheel on each page to move to the desired field. Once there, click the scroll wheel to reveal pop-up lists, to enter check marks, or to edit available text.

The **SETTINGS** for Report & Title Choices, the Observation Rating Scale, and Observer Information are typically entered on the desktop software and downloaded to the Blackberry. To change these settings for a particular observation on the Blackberry, open an observation choose **SETTINGS** from the menu. The subsequent screen will reveal areas that can be adjusted.



Adjustment of these preference settings is described in detail elsewhere in this manual. Their content can be changed for any job appraisal done on the handheld. Changes will be effective for the current appraisal only and will not affect the user's desktop defaults.

Pressing **REPORT \ TITLE CHOICES** will reveal the following screen.



The user can change any displayed option. Keep in mind these are **titles** of sections, not the actual content of the section.

Pressing **OBSERVER INFORMATION** will reveal the following screen.



As with other screens in the **SETTINGS** area, the user can adjust any displayed information. The changes will affect only the current observation, not the basic downloaded preferences.

Pressing **OBSERVATION RATING SCALE** will reveal the following screen.



The full text of the observation rating scale is shown and may be changed. It is important to note that the drop down box that appears when the program is in use may display shortened or truncated descriptors because of limited screen space. The actual descriptors entered at this screen by the user will appear when the completed appraisal is uploaded to the desktop PC.


## Data Entry

The screen below illustrates the component parts found on every data entry screen when using *The Administrative Observer* on a Blackberry device.

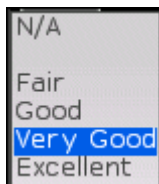


The four parts of each data entry screen are

1. the Quality Indicator checkbox,
2. the Rating Scale drop down box,
3. the Quality Indicator text display, and
4. the Observation Notes button.

The **Quality Indicator checkbox**  allows the user to turn on and to turn off any quality indicator desired. A check in this box means the quality indicator is active and will be reflected in the observation or evaluation document.

The **Rating Scale** drop down box allows the user to indicate how well a particular quality indicator was performed. Indicators may appear to be shortened in the drop down box, but the full text of the rating scale will appear in the uploaded and printed document.



The **Quality Indicator text** displays the beginning portion of quality indicator. This will most often be enough for an experienced user to know the full text. However, there will be times when the user wishes to view or change the text of the quality indicator.

Highlight the text of any quality indicator and click the BlackBerry scroll wheel to view or edit its contents. Text can be entered directly by typing.



It is important to note that the user must highlight and click the OK button after viewing or modifying the quality indicator text.

The **Observer Notes** button functions in a similar manner, allowing the user to append notes to the paragraph text of each section.



Again, the **Observer Notes** OK button must be clicked to save content before leaving this screen. It is important to emphasize that these notes will be appended to the paragraph text of each tabbed observation section when uploaded to the desktop software for viewing, editing, or printing.

The **CLOSING** tab does not contain the same components as the other data entry screens on the handheld.



Text for the Commendations and the Recommendations can be entered directly by typing. Users more comfortable with the desktop PC keyboard can complete these sections after uploading to the desktop by editing the uploaded file prior to generating the feedback report to the teacher.

#### Optional use of the NOTES toggle.

The user may elect to enter **NOTES** for each section of the observation record. **NOTES** are meant to be somewhat brief, a couple of sentences as opposed to an essay. Several possibilities exist.

If **NOTES** are not entered on the Blackberry handheld, the paragraph text of the desktop preferences will appear unaltered.

If **NOTES** are entered, and if **no** paragraph exists on the desktop preferences, the NOTES will appear in the place of the missing paragraph.

Finally, if **NOTES** **are** entered, and if the desktop preferences do contain paragraph text, the NOTES will be appended to the end of that text. This is the most likely situation the user will encounter.

## Using Templates on the Blackberry Handheld

Templates can be particularly useful on handheld devices. Without templates, the user will have to download fresh preferences whenever the job category of the person being observed or evaluated changes. With templates, however, evaluations of many different individuals with different job categories are possible.

To create and use templates on the handheld, the user must prepare preferences for each desired job category on the PC desktop.

**Illustration:** A template for an elementary school teacher will be created. These same steps would be used to create a template for any job category

- From the desktop menu bar, choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School**.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Download the preferences to your handheld device.
- On the handheld, open a new observation. Instead of person's name, enter the name Template Elementary. Click **SAVE** without completing any part of the data entry.
- Repeat the process for every job category you might use frequently.

**IMPORTANT:** Copy the template. Use the copy. Treat your template as you would a master document that is always copied but never used.

To use the template as a starting point for an observation of Alice Johnson, for example, highlight the name of the desired template and use the **COPY** feature to create a second file named "Alice Johnson."

Some handheld users find having a series of templates on the device to be more efficient than downloading preferences each time evaluations for a new job category are begun.

Always treat your template as a read-only master document. Copy the template. Use the copy.

## Walkthrough Observations using a Blackberry handheld device

The purpose of the handheld version of **The Administrative Observer** is to increase convenience for users, a purpose readily achieved when the program is used for brief observation visits commonly known as “walkthroughs.”

The recommended technique for using **The Administrative Observer** for walkthroughs involves

- Creating a set of “walkthrough” preferences, typically using just one or two tabs with a smaller set of quality indicators
- Downloading the walk through preferences to the handheld
- Using the walk through preferences on the handheld to record your observations
- Uploading the walkthrough observation to the desktop version for final editing and printing.

An example of walkthrough preferences used to rate the observed teacher on each quality indicator is shown below on left.



Another method for recording a walkthrough observation is to use a blank rating (replace “POOR” with a blank, for example), then simply activate the checkmark to indicate only the behaviors observed. This alternative is shown in the illustration above on right.

## Uploading an observation or evaluation

Completed or partially completed observation and evaluation files can be uploaded to the Blackberry server and then retrieved by **The Administrative Observer** desktop software for viewing, editing, printing, or archiving.

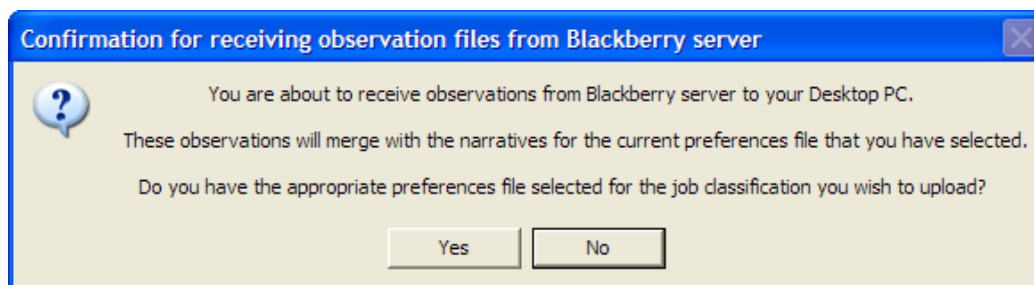
It is **important** for the active preferences on the desktop to match the preferences on the handheld if the desktop preferences contain any paragraph narrative. This is not important if you are concerned only with the checklist component.

Following upload, the user can leave the file on the handheld or delete it. Deletion is recommended to regain space on the handheld. Once deleted from the handheld device, however, the files cannot be retrieved. Users are cautioned to be sure of successful upload prior to deleting files from the handheld.

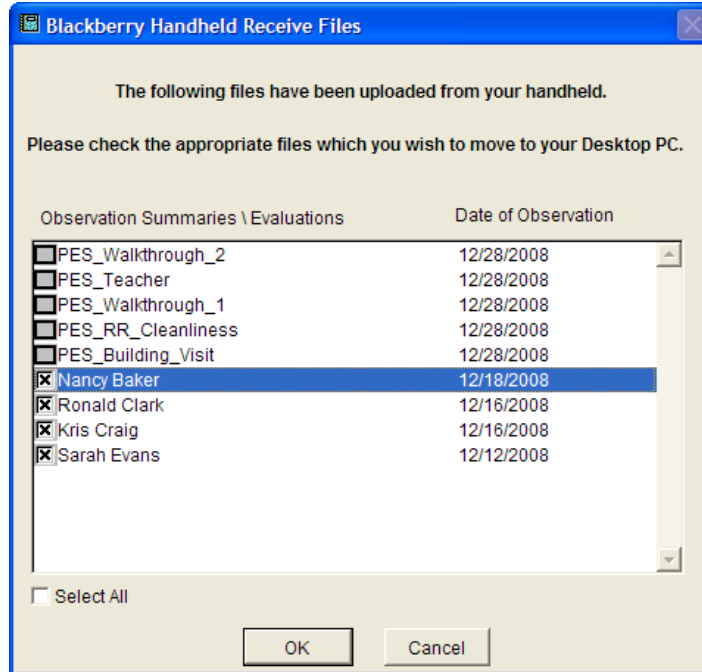
The user should select **UPLOAD ALL OBSERVATIONS** from the Blackberry menu. This will SEND the observations to the Blackberry server where they can be retrieved by **The Administrative Observer** desktop software.



The user should select **BLACKBERRY | RETRIEVE OBSERVATIONS FROM BLACKBERRY SERVER** to begin the retrieval process. A cautionary dialogue will appear to verify that preferences on the desktop match the type of work being uploaded.



The user should click the **YES** button to begin the upload. All the observation and evaluation files on the user's handheld will be uploaded to the desktop software. The following dialogue will appear.



The user will most likely wish to move only some of these files to the desktop and should click the checkbox beside the file names of those to be moved. There is certainly no reason to migrate templates to the desktop with each upload.

Especially if the upload moved more than one type of employee, the user should be careful to click the checkbox of only those files consistent with the current active preferences. From the illustration above, one file is for a teacher while the other is for a custodian. The active desktop preferences will determine which uploaded files the user should select.

Users who mistakenly mismatch files when uploading can recover by changing the desktop preferences to match the desired upload and performing the upload a second time. For example, a user who uploads a custodian evaluation when secretarial preferences are active can recover by changing the desktop preferences and uploading the custodial evaluation a second time.

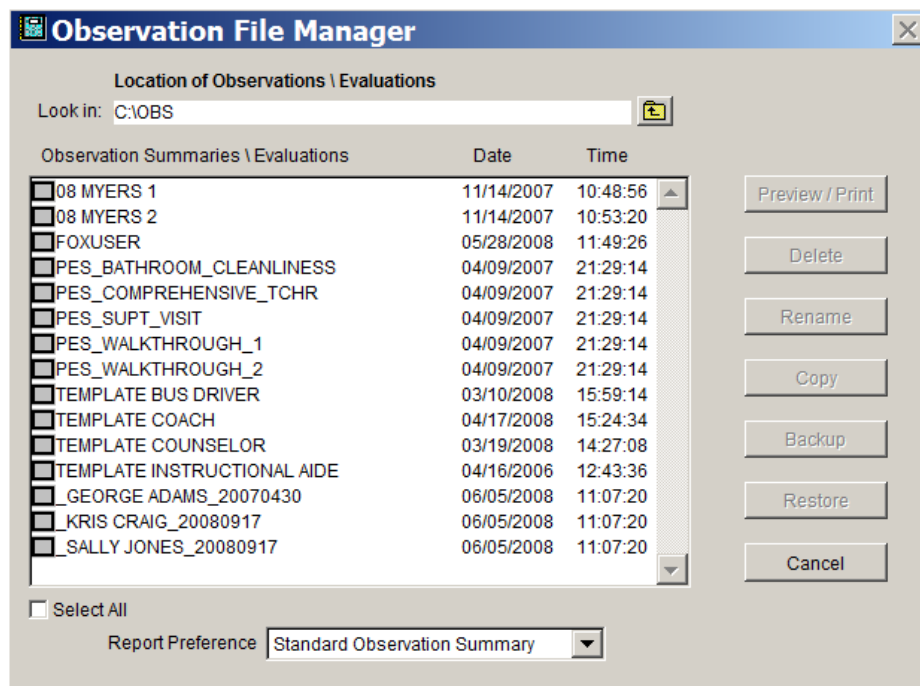
## Working with Uploaded Files

Once uploaded to the PC desktop, files begun on the handheld can be viewed, edited, printed, or archived like any file begun on of **The Administrative Observer** desktop.

Three steps are recommended following upload from the handheld.

- Rename the file according to the district's approved file naming protocol.
- Open the file to validate its content or edit if necessary.
- Generate a feedback report to the employee.

To rename, the user should click **FILE | OBSERVATION FILE MANAGER** to activate the Observation File Manager. The following dialogue will appear.



Uploaded files will always appear **at the bottom** of the file listing and will show the employee name followed by a series of numbers. The user should rename uploaded files according to the approved naming protocol.

As retrieved    \_GEORGE ADAMS\_20070430  
-----  
As renamed    11 Adams 1

In the example above, the renaming protocol has three parts.

|                        |   |       |                                   |
|------------------------|---|-------|-----------------------------------|
| Fiscal Year            | = | FY11  | <b><u>Resultant File Name</u></b> |
| Teacher last name      | = | Adams | 11 Adams 1                        |
| serial number of visit | = | 1     |                                   |

After renaming, the user should click **CANCEL** to exit the observation file manager.

To open the file to validate or edit its contents, the user should click **FILE | OPEN** and select the uploaded file as renamed. Review and adjust the content of the file as desired using the procedures detailed earlier in this manual. Following revision, save the edited file.

To generate feedback to the observed employee, the user should click **REPORTS | OBSERVATION REPORTS** and follow the logical prompts. The procedure for report creation is detailed in earlier parts of this manual.

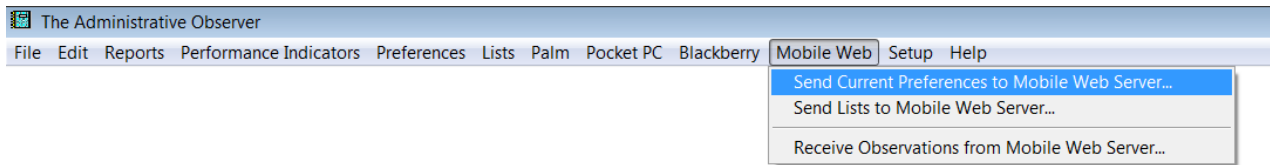
## The Administrative Observer on the iPhone handheld

**The Administrative Observer** allows data entry at your convenience using an iPhone. Whether used while observing the employee or later while away from the desktop PC, the handheld module greatly increases the convenience of data entry.

A separate license is required for each iPhone user. To obtain a license, contact the publisher using the e-mail information on the title page to this manual and at <http://www.mobileobs.com>.

**The Administrative Observer iPhone Edition** is a mobile web application that works in partnership with the desktop software. Users should install the standard edition desktop program from CD then update to the most current version promptly. Version 5.24 or higher of the desktop software is required to support the iPhone edition.

Operation of **The Administrative Observer** is conceptually parallel on all supported handheld devices. The desktop menu bar has separate but similar dropdown menus for each.



There are, however, interface differences specific to each device. For this reason, separate sections of this manual will describe installation and operation on each handheld type.

## Supported Handheld Devices

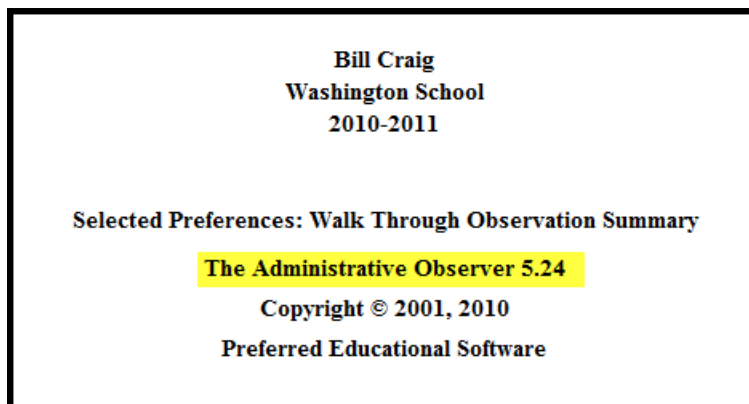
|                      |   |
|----------------------|---|
| Blackberry           | <p>Most models including ...<br/>Curve, Bold, Tour, Pearl, World Edition and Storm</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - 4.2.1 or later</p>              |
| iPhone               | <p>All generations of iPhone, iPod Touch, and iPad</p> <p>Utilizes <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Windows<br>Mobile    | <p>Most handhelds including ...<br/>HP iPaq series, Dell Axim series, Treo series</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Windows Mobile 2003 or later</p> |
| Android              | <p>Most models utilizing Mobile Web version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>  |
| Palm                 | <p>Most models including Tungsten, TX, Centro, Treo series</p> <p>Palm Pre/Pixi utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Palm OS 3.5 or later</p>                              |
| Other<br>smartphones | <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |

## Initial Setup and License Registration

Four setup steps are needed prior to first use.

1. Update your desktop software to version 5.24 or higher. This essential update is **free** to registered users.
2. Register your license for the iPhone Edition.
3. Configure the desktop software using the login ID and password assigned during license registration.
4. Send your preferred content and lists to the mobile web server for use with the iPhone Edition.

Step 1. Start The Administrative Observer on your desktop. Your version number will be shown on the screen as illustrated below. Your desktop software must be version 5.24 or higher to support the iPhone edition.

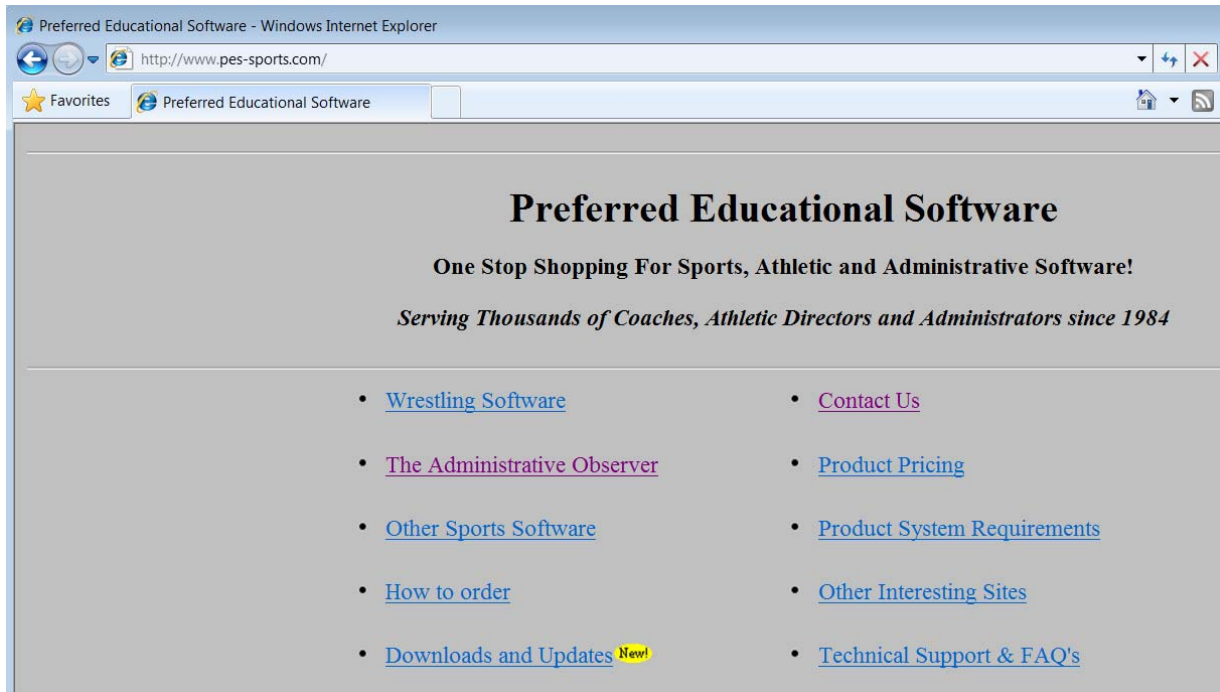


Prior to upgrade, users who have customized their preferences, lists, or templates should backup that content to a safe, known location so it can be restored after the upgrade. New users who have not yet customized preferences or created lists or templates can safely skip this step.

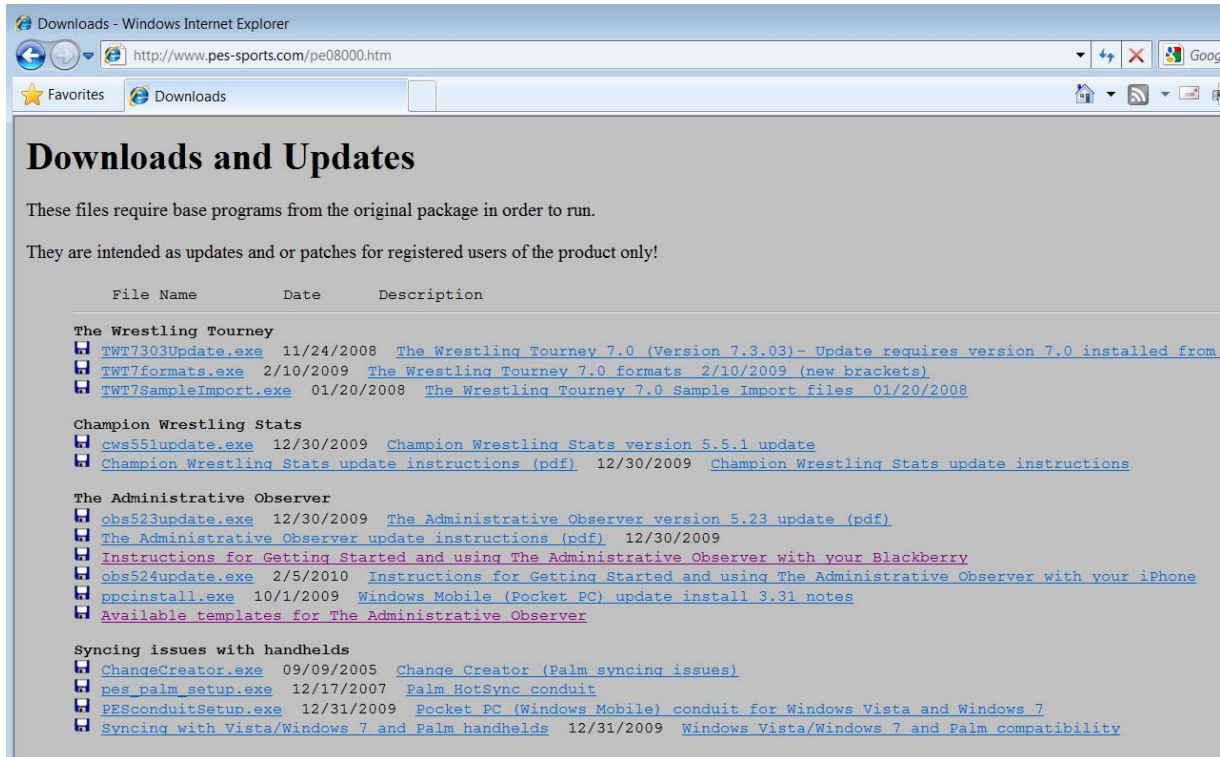
The procedures to backup and restore preferences, lists, and templates are described in detail elsewhere in this manual.

| <b><u>Task</u></b>           | <b><u>Page Reference</u></b> |
|------------------------------|------------------------------|
| Backup / Restore Preferences | pp. 30 – 31                  |
| Backup / Restore Lists       | pp. 42 – 43                  |
| Backup / Restore Templates   | pp. 68 – 69                  |

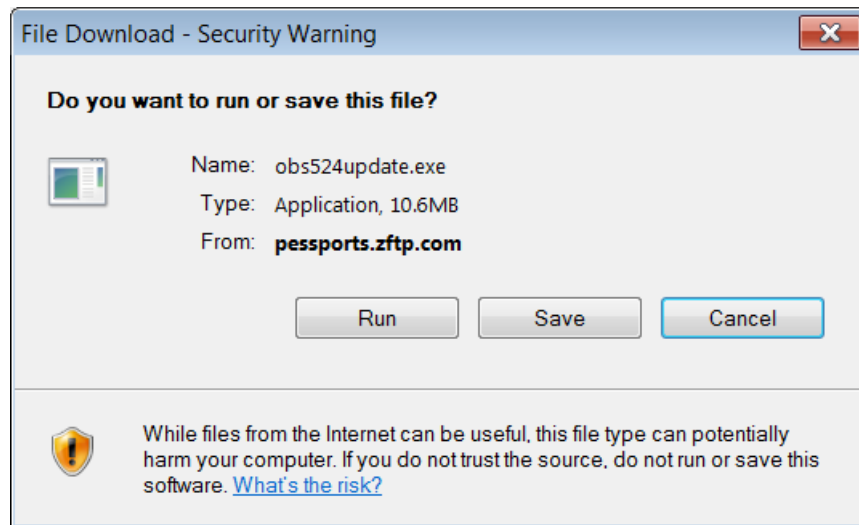
To proceed with the update of your existing desktop software to version 5.24 or higher, use your desktop browser to visit: <http://www.pes-sports.com>



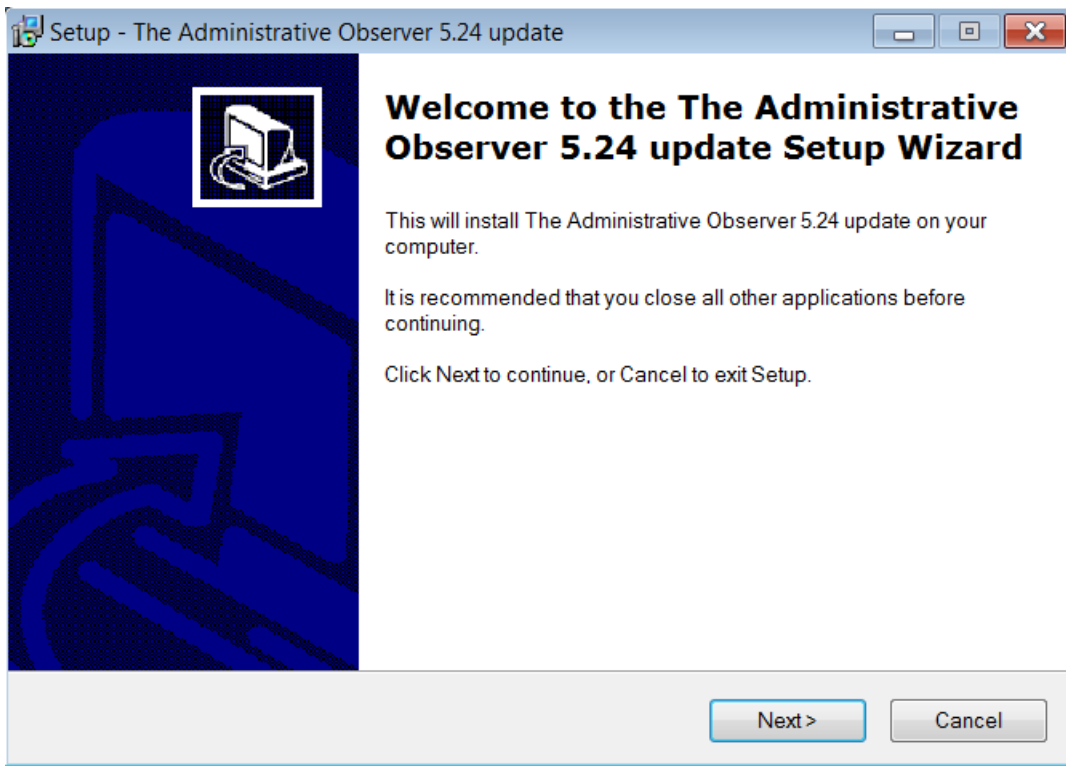
Click on Downloads & Updates, then scroll to the section titled The Administrative Observer.



Choose the file named obsXXXupdate.exe where XXX indicates version number 524 or higher. SAVE this file to your desktop or other known location.

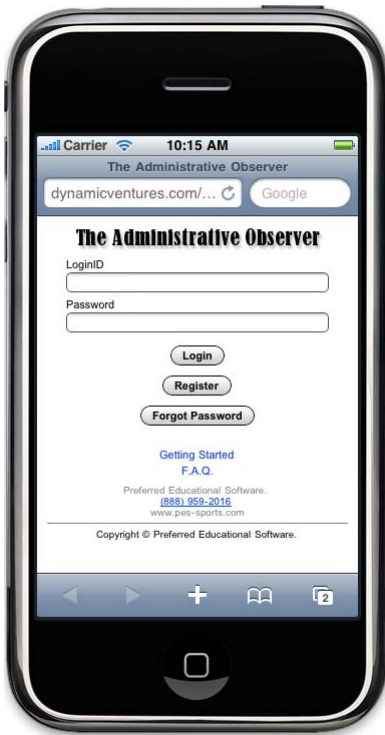


Once downloaded, close all programs and double-click the update wizard. Accept the prompts as given.



When the wizard has completed your update, import or restore all preferences, lists, or templates you backed up earlier. With that job complete, your desktop software will be ready for use with the iPhone edition.

**Step 2.** Visit <http://www.mobileobs.com/> to register your iPhone edition license. This can be done on your iPhone or with your desktop browser. Click the **REGISTER** icon on the initial screen.



A form will appear requesting your information.

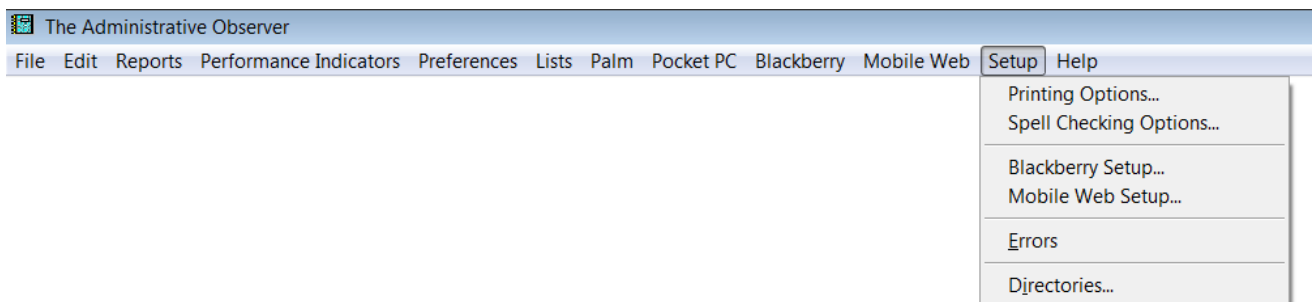
Complete all areas, then click REGISTER when finished.

A login ID and password will be emailed to you within 24 hours.

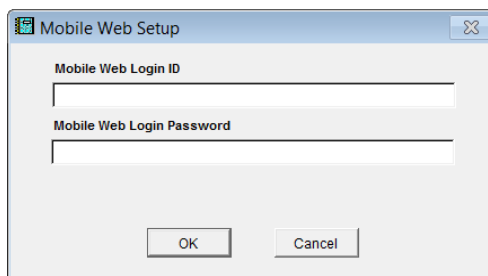
Please note:  
Incomplete information will delay license registration.



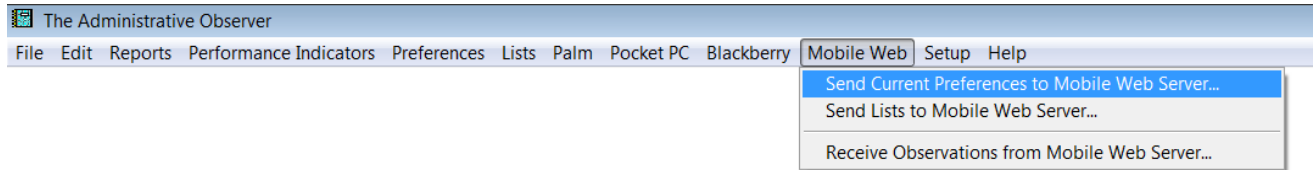
**Step #3.** When you receive the login ID and password assigned following license registration, open the desktop software and choose SETUP from the menu bar.



Choose Mobile Web Setup, then enter the assigned login ID and password. This information allows the desktop software to work in partnership with your iPhone.

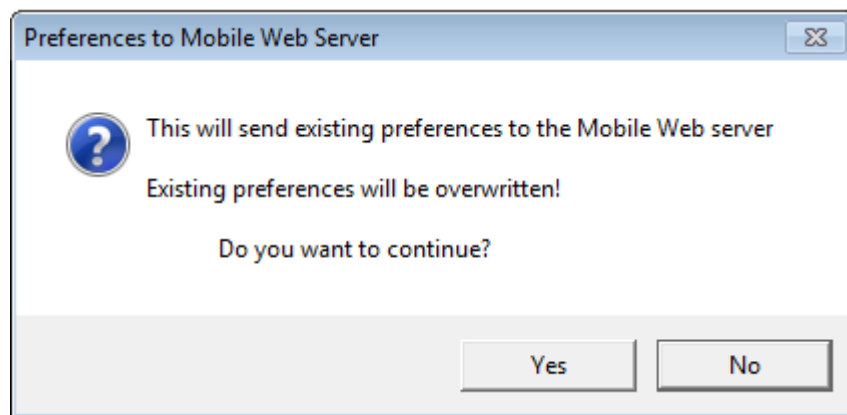


**Step #4.** Using the desktop software, configure your preferences and popup lists to your liking (see manual pp. 42 – 43 for details). When ready, upload that material to the Mobile Web Server for use on your iPhone. Open the desktop software and choose MOBILE WEB from the menu bar.



In turn, choose SEND PREFERENCES ... and SEND LISTS ....

In each case, a cautionary dialogue will appear asking if you are sure. Unless you arrived at this point by accident, respond by clicking YES.



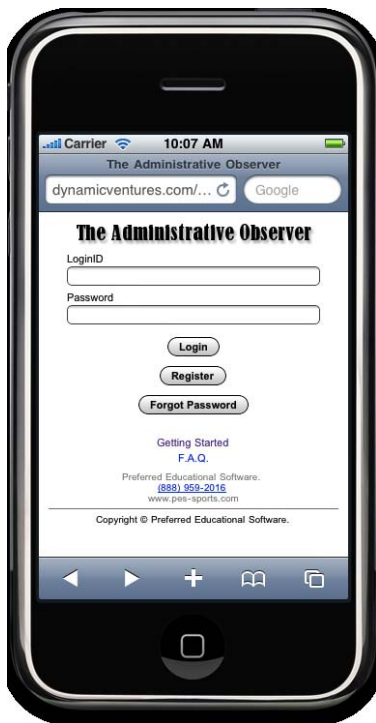
The Administrative Observer iPhone Edition is now ready for use on your iPhone at <http://www.mobileobs.com/>

## Operation of The Administrative Observer on an iPhone

The Administrative Observer iPhone Edition is a mobile web application accessed via the browser in your iPhone. The mobile web server temporarily stores your observation thoughts. At your convenience following the observations, use the desktop software to download this data for report creation and analysis.

Importantly, the mobile web server is meant for temporary storage of your collected data. Up to twenty observations can accumulate on the mobile web server. At that point, however, no more observations can be completed until the existing observations are downloaded to the desktop software and deleted from the server to make room for new observations. Users are encouraged to download and delete observations from the server before reaching the twenty observation limit.

### Overview



Visit <http://www.mobileobs.com/> and enter your login ID and password as assigned.

Tap Done, then tap Login when ready.



The initial screen for The Administrative Observer iPhone Edition will appear. Page segments are detailed below. It is important to note that current preferences will always be shown immediately above the lower navigation dropdown, not in the files listing.



The **Current Active Preferences** are your preferred starting pointing language uploaded to the mobile web server from your desktop software. This language will be used whenever the user selects NEW OBSERVATION from the **Navigation Dropdown** and should therefore be the language you plan to use most often.

The **List of Templates and Observations** shows observations currently in temporary storage on the mobile web server. They should be downloaded to your desktop for report generation and archiving. Templates are also shown in this listing. Templates contain starting point language that is used occasionally. Treat templates as master documents that are never used directly. Copy a template, then use the copy.

**The Navigation Dropdown** appears above and below the files listing for your convenience. Its content varies according to your task context. While viewing the initial observation screen list shown above, the choices available are ...

| <u>Function</u>         | <u>Comment</u>   |
|-------------------------|--|
| New Observation         | Begin new observation using active preferences                             |
| Observation List        | View the list of observations and templates                                |
| Delete All Observations | Use care – also deletes templates!   |
| Change Password         | <u>Important:</u> remember to configure desktop software with new password |
| Log Out                 |  |

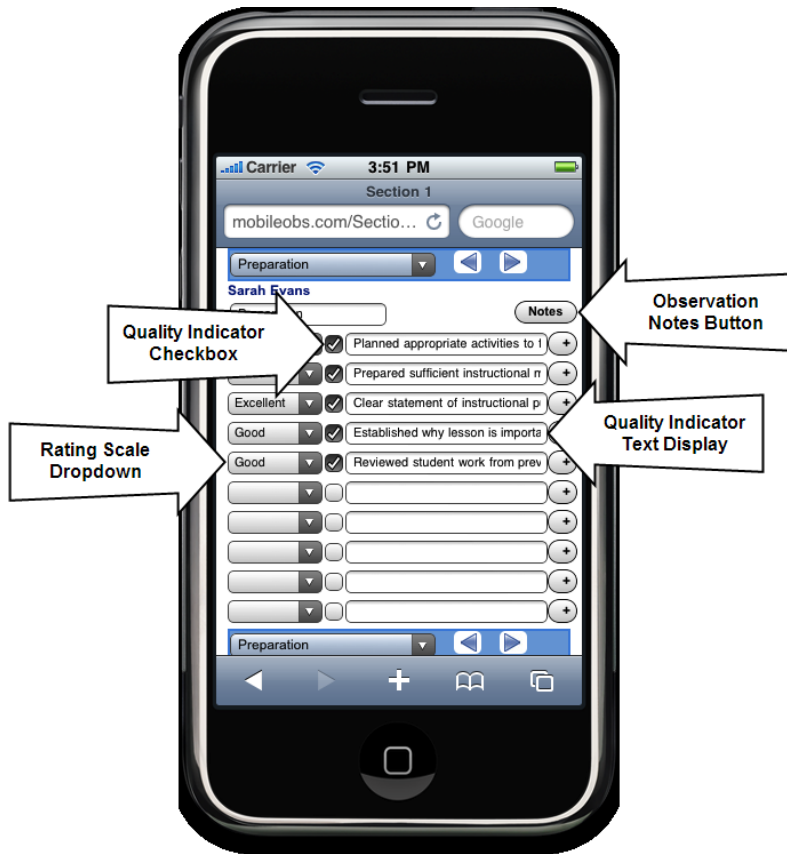
When completing an observation, the navigation dropdown choices change to fit that context.

| <u>Function</u>  | <u>Comment</u>                                   |
|------------------|--|
| Next             | Move to NEXT segment                             |
| Previous         | Move to PREVIOUS segment                         |
| Introduction     | First segment for a new observation              |
| Segments 1-6     | Jump to the desired segment                      |
| Closing          | Enter comments in two closing areas.             |
| Settings         | Adjust a variety of settings.                    |
| Observation List | Return to the initial screen                     |
| Logout           | Leave The Administrative Observer iPhone Edition |

**The Action Choices Dropdown** is shown only while viewing the observation list screen. Action choices available are shown below.

| <u>Function</u> | <u>Comment</u>  |
|-----------------|---|
| Open            | Allows adjustment to a template or continued work on an observation begun earlier   |
| Copy            | Especially useful with templates. Always COPY a template. Use the copy.   |
| Delete          | Observations should be DELETED following download to your desktop software. Deleted observations cannot be recovered, so be sure to download first. |

Every data entry screen will contain similar components on an iPhone.



The four parts of each data entry screen are

1. the Quality Indicator checkbox,
2. the Rating Scale dropdown box,
3. the Quality Indicator text display, and
4. the Observation Notes button.

The **Quality Indicator checkbox**  allows the user to turn on and to turn off any quality indicator desired. A check in this box means the quality indicator is active and will be reflected in the observation or evaluation document.

The **Rating Scale** drop down box allows the user to indicate how well a particular quality indicator was performed.



The **Quality Indicator text** displays the beginning portion of quality indicator as in the screen on the left. This will most often be enough for an experienced user to know the full text.

There will be times when the user wishes to view or change the text of the quality indicator. For this, tap the “plus” icon to the right of the text to be changed. The screen at right will appear. Review or edit the text as desired, then tap OK.



## The Observer Notes button

The user may elect to enter **NOTES** for each section of the observation record. **NOTES** are meant to be somewhat brief, a couple of sentences as opposed to an essay. Several possibilities exist.

If **NOTES** are not entered on the iPhone, the paragraph text of the desktop preferences will appear unaltered.

If **NOTES** are entered, and if **no** paragraph exists on the desktop preferences, the **NOTES** will appear in the place of the missing paragraph.

Finally, if **NOTES** are entered, and if the desktop preferences do contain paragraph text, the **NOTES** will be appended to the end of that text. This is the most likely situation the user will encounter.



To view or change the **NOTES** text for each observation segment, tap the **NOTES** icon. The screen at right will appear. Review or edit the text as desired, then tap **OK**.



The **CLOSING** tab does not contain the same components as the other data entry screens on the handheld.



Text for the Commendations and the Recommendations can be entered directly by typing. Users more comfortable with the desktop PC keyboard can edit or complete these sections after downloading to the desktop if desired

## Before Completing Your First Observation

For increased convenience, we recommend two actions even before you record your first observation:

- change your password, making it easy to remember but known only to you, and
- create an iPhone shortcut to your application.

### Changing your password.

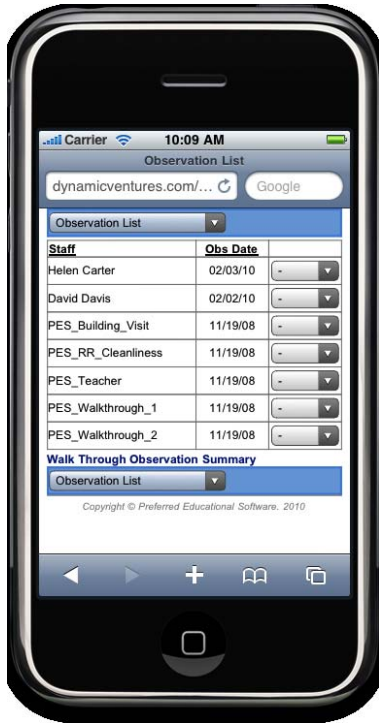


Visit <http://www.mobileobs.com/> and enter your login ID and password as assigned.

Tap Done, then tap Login when ready.



The main screen for The Administrative Observer iPhone Edition will appear.

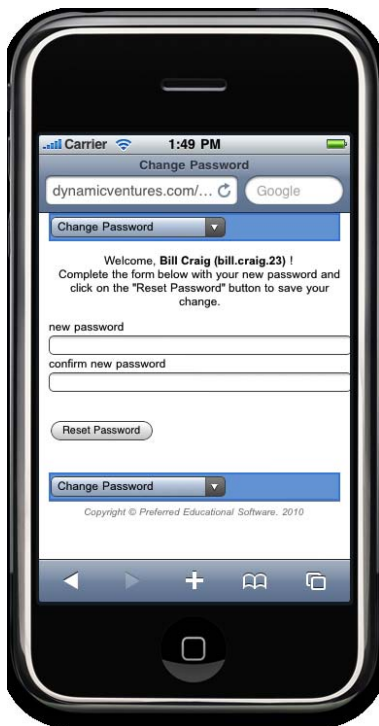
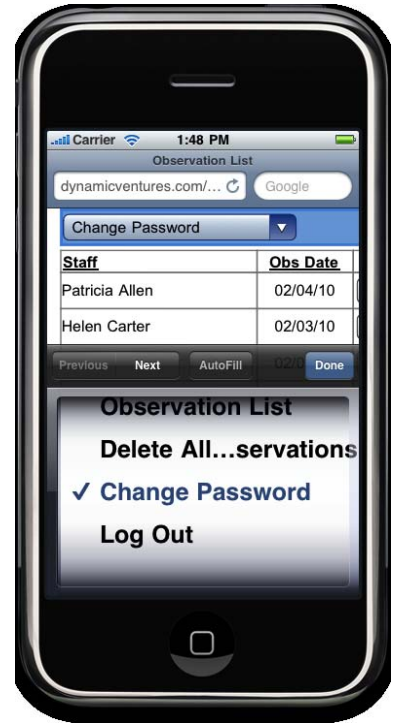


The center of the screen displays completed observations and available templates.

Current active preferences are displayed just below this list.

A pop-up list above and below the list of observations contains all navigation choices.

Tap the pop-up list, then tap the option to Change Password.



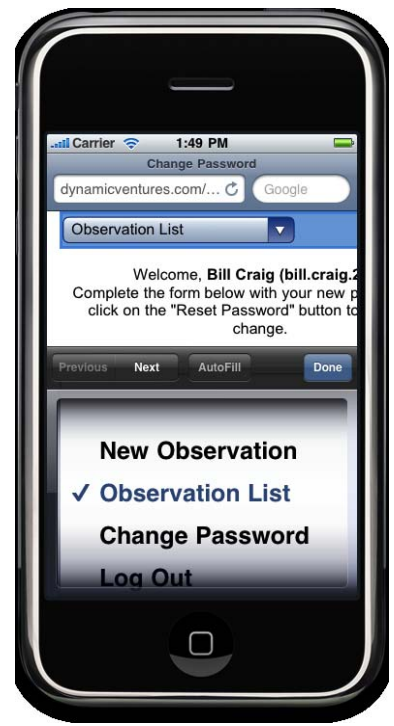
The Change Password screen will appear.

Enter and confirm your new password as prompted. Tap Reset Password when done.

Your new password is now active.

**Very Important:** Remember to configure your desktop software with this new password.

To leave this screen without changing your password, tap the pop-up list and navigate back to the Observation List.



Creating an iPhone home screen shortcut to your application.



Visit <http://www.mobileobs.com>  
The screen to the left will appear.

Tap the “+” icon at the bottom of the screen.

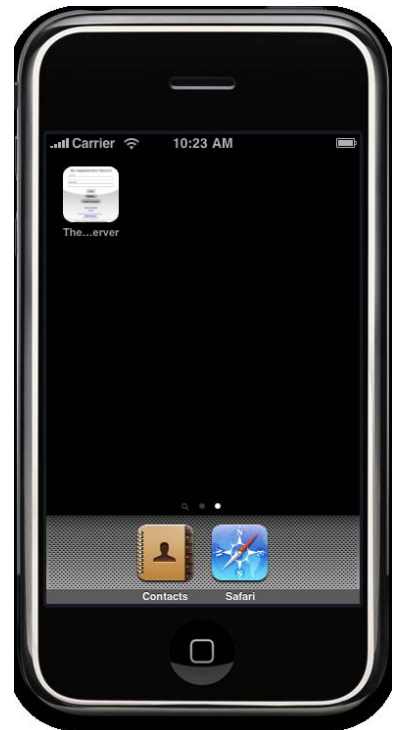
For greatest convenience, tap the option to add a bookmark to your home screen.



A confirmation screen will appear. Tap the ADD icon.

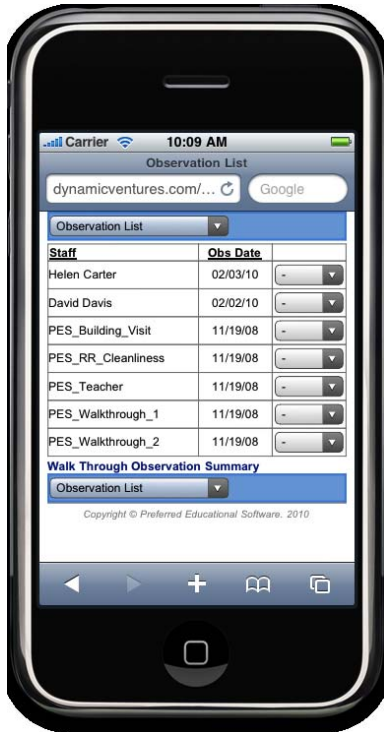
A shortcut will be added to your iPhone home screen.

Tap the new shortcut for easy direct access to The Administrative Observer iPhone Edition.



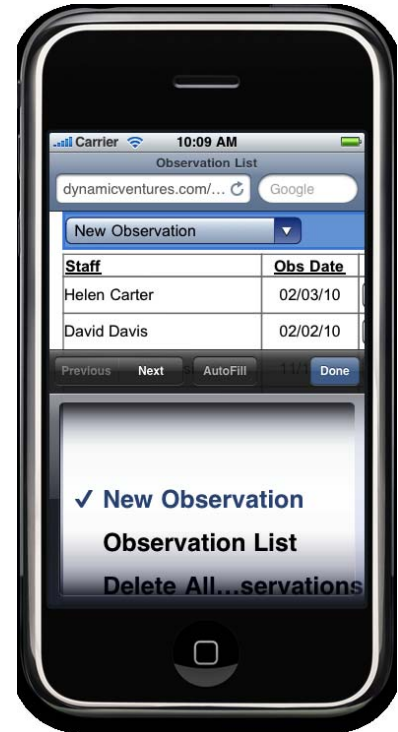
## Creating a NEW observation or evaluation on the iPhone

Access The Administrative Observer iPhone Edition using your home screen shortcut. After log in, the main screen will appear.

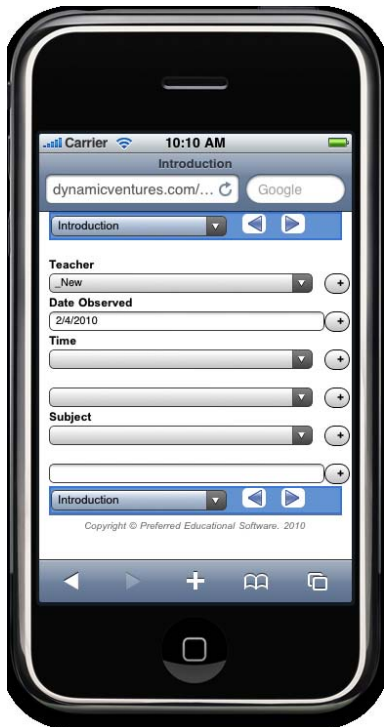


Tap the navigation pop-up list where "Observation List" currently appears.

Tap the option to create a new observation, then tap Done.



✓ New Observation  
Observation List  
Delete All...servations



A new blank observation will appear, based on preferences you uploaded earlier.

The teacher name is shown as "\_New". Tap the teacher name pop-up list to choose an actual teacher from your faculty.

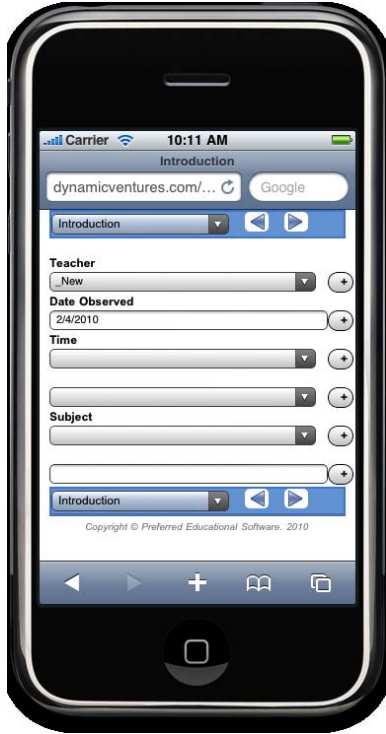
Tap the appropriate teacher name, then tap Done.

The staff member name will be recorded as the file name on your iPhone main screen.



\_New  
Lisa Adams  
✓ Patricia Allen  
Christophe Anderson  
Nancy Baker

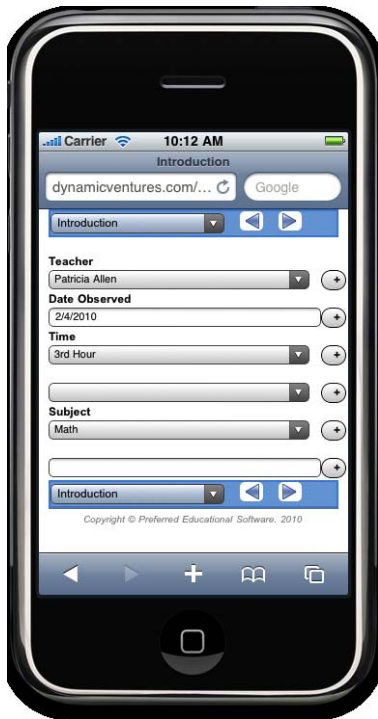
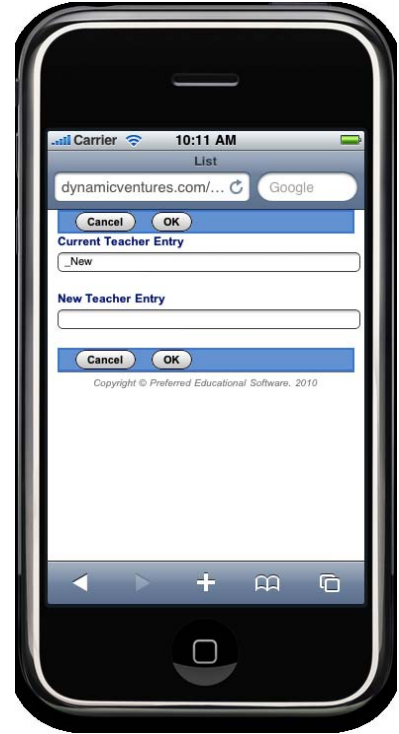
For a teacher not shown in your pop-up list, you can enter the name directly.



The teacher name is shown as “\_New” Tap the “+” icon to the right of the pop-up list to enter a name.

Tap the area for “New Teacher Entry” and enter the name desired. Tap Done when complete.

Tap OK to confirm, or Cancel to exit with no entry.



Having entered the teacher name, complete the remaining areas on the INTRODUCTION segment in similar fashion.

Tap the word INTRODUCTION in the navigation pop-up list, then tap PERCEPTIONS to move to that segment.



The PERCEPTIONS segment will appear. Note that your segment title may be different according to the preferences you uploaded.



Tap the small square icon to the left of each observed teaching standard. A check mark will appear.

Items not observed should not be tapped.

Tap a second time to remove a check mark entered by accident.



For each checked item, you have the option to enter a rating. Local policy will determine if ratings are used.

To enter a rating, tap the pop-up to the left of a check mark and choose the appropriate rating. Tap Done when finished.

It can be appropriate to rate some items and not others.

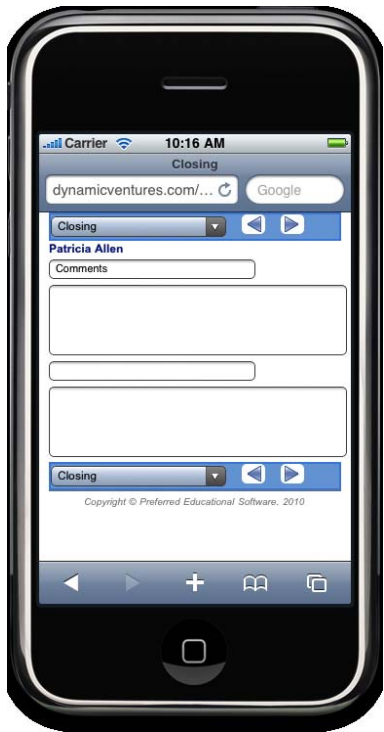
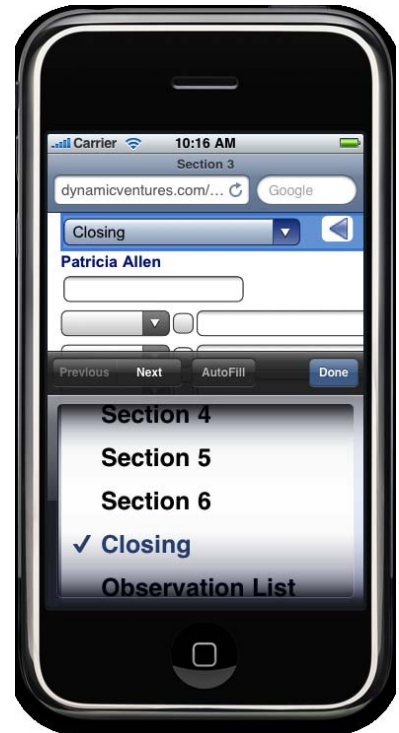


Tap the Navigation pop-up list, and choose the Reflections segment. Your segment title may be different according to the preferences you uploaded.



Tap the small square icon to the left of each item you want the teacher to consider for improvement. A check mark will appear.

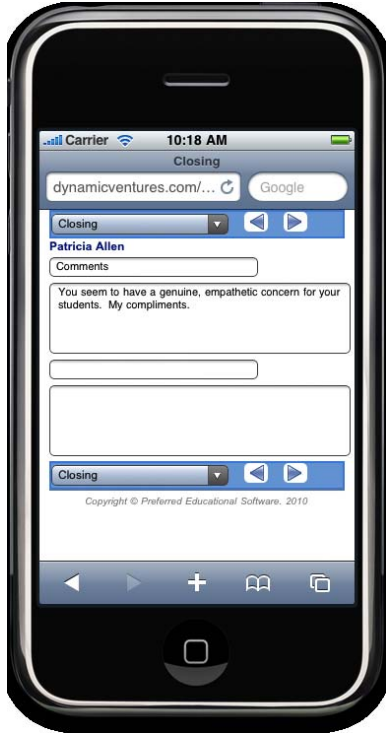
When all reflection items have been indicated, tap the word REFLECTIONS in the pop-up list. Choose the CLOSING segment and tap Done.



An area to enter comments will appear. Tap the text entry area, then express your comment.

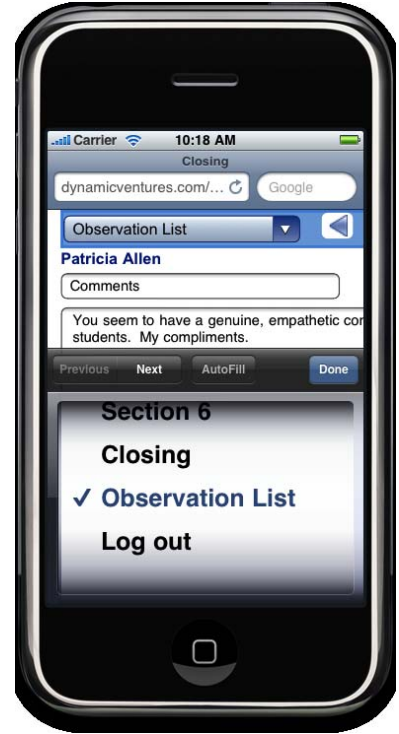
Tap Done when finished.





Having completed the record of your observation thoughts, tap the navigation pop-up list and choose Observation List.

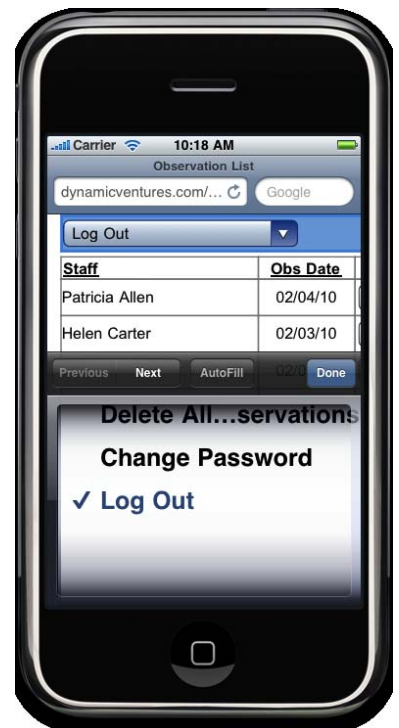
Tap done when ready.



The name of the teacher for whom you completed this observation will appear in the main screen list.

Tap your pop-up navigation list and choose Log Out.

Your observation is now stored on the mobile web server, awaiting download to your desktop software for final editing (if any) and report creation.



The **SETTINGS** for Report & Title Choices, the Observation Rating Scale, and Observer Information are typically entered on the desktop software and downloaded to the iPhone. To change these settings for a particular observation on the iPhone, move the INTRODUCTION screen.



It is important to note that **SETTINGS** for a particular observation on the iPhone can be changed only from the INTRODUCTION screen.

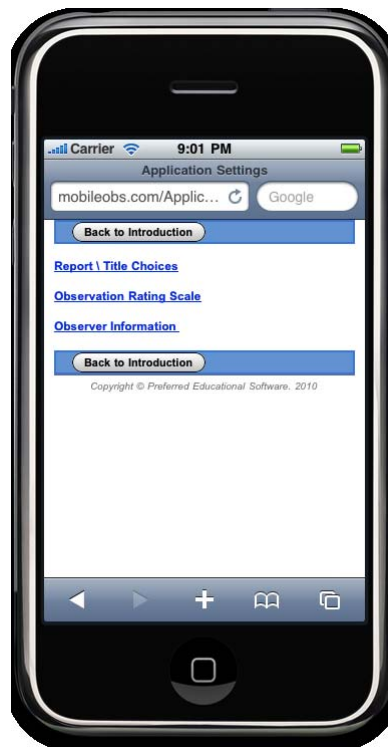
While on the INTRODUCTION screen, tap the NAVIGATION dropdown and choose **SETTINGS**.

The subsequent screen will reveal areas that can be adjusted.



The subsequent screen will reveal areas that can be adjusted.

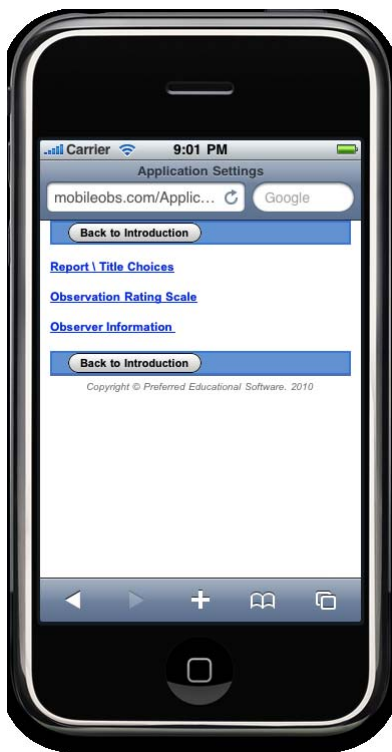
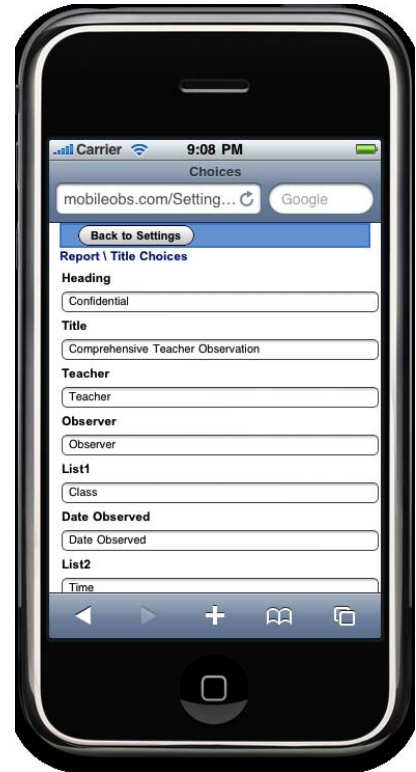
Changes will be effective for the current appraisal only and will not affect the user's desktop defaults.





Tapping **REPORT \ TITLE CHOICES** will reveal the screen at right.

The user can change any displayed option. Keep in mind these are ***titles*** of sections, not the actual content of the section.

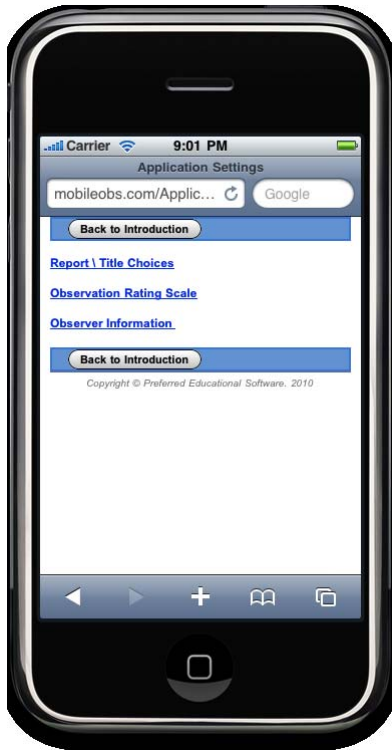


Tapping **OBSERVATION RATING SCALE** will reveal the screen at right.

The full text of the observation rating scale is shown and may be changed.

The changes will affect the current observation only, not the preferences that were uploaded from your desktop software.

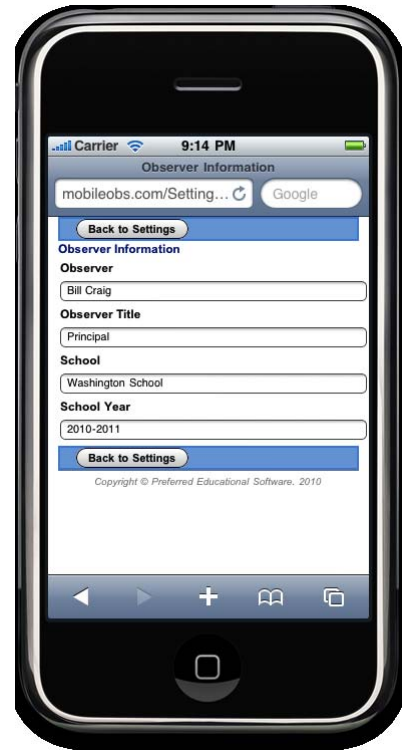




Tapping **OBSERVER INFORMATION** will reveal the screen at right.

As with other screens in the **SETTINGS** area, the user can adjust any displayed information.

The changes will affect the current observation only, not the preferences that were uploaded from your desktop software.



## Using Templates on the iPhone Handheld

Templates can be particularly useful on handheld devices. Without templates, the user will have to download fresh preferences whenever the job category of the person being observed or evaluated changes. With templates, however, evaluations of many different individuals with different job categories are possible.

To create and use templates on the iPhone, the user must prepare preferences for each desired job category on the PC desktop.

**Illustration:** A template for an elementary school teacher will be created. These same steps would be used to create a template for any job category

- From the desktop menu bar, choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School**.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Upload the preferences to your handheld device.
- On the handheld, open a new observation. Instead of person's name, enter the name Template Elementary. Click **SAVE** without completing any part of the data entry.
- Repeat the process for every job category you might use frequently.

**IMPORTANT:** Copy the template. Use the copy. Treat your template as you would a master document that is always copied but never used.

To use the template as a starting point for an observation of Alice Johnson, for example, use the **COPY** feature from the action dropdown to the right of the template. Choose "Alice Johnson" as the teacher name in the copied file.

Some handheld users find having a series of templates on the device to be more efficient than uploading preferences each time observations for a new job category are begun.

Always treat your template as a read-only master document. Copy the template. Use the copy.

## Walkthrough Observations using an iPhone handheld device

The purpose of the handheld version of ***The Administrative Observer*** is to increase convenience for users, a purpose readily achieved when the program is used for brief observation visits commonly known as “walkthroughs.”

The recommended technique for using ***The Administrative Observer*** for walkthroughs involves

- Creating a set of “walkthrough” preferences, often using just one or two tabs with a smaller set of quality indicators
- Uploading the walkthrough preferences to the handheld
- Using the walkthrough preferences on the handheld to record your observations
- Downloading the completed observation to the desktop software for final editing and printing.



One technique (left) often used during a walkthrough observation involves using a blank rating (replace “POOR” with a blank, for example), then activate the checkmark to indicate only the behaviors observed.

A different technique is to rate the observed teacher on each quality indicator as shown on the right.



## Retrieving observations from the Mobile Web Server

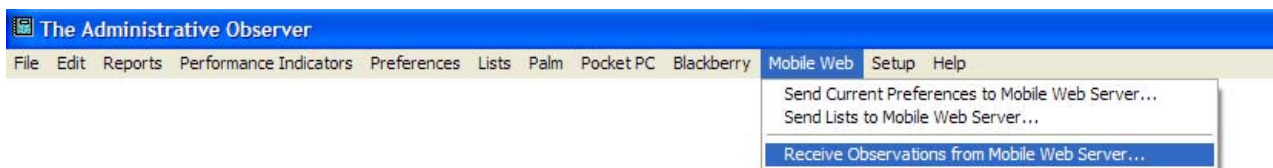
When ready, your observation files can be retrieved by **The Administrative Observer** desktop software for viewing, editing, printing, or archiving.

**Please Note:** The mobile web server is meant for temporary storage of your collected data. Up to twenty observations can accumulate on the mobile web server. At that point, however, no more observations can be completed until the existing observations are downloaded to the desktop software and deleted from the server to make room for new observations. Users are encouraged to retrieve and delete observations from the server before reaching the twenty observation limit.

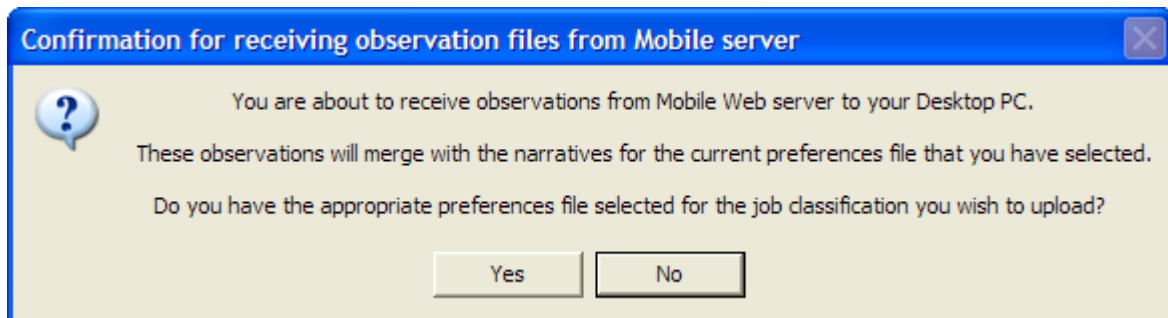
It is **important** for the active preferences on the desktop to match the preferences on the handheld if the desktop preferences contain any paragraph narrative. This is not important if you are concerned only with the checklist component.

Following download to the desktop software, the user should delete the file from the mobile web server. Users are cautioned to be sure of successful download to the desktop prior to deleting files from the handheld.

The user should select **MOBILE WEB | RETRIEVE OBSERVATIONS FROM MOBILE WEB SERVER** to begin the retrieval process.

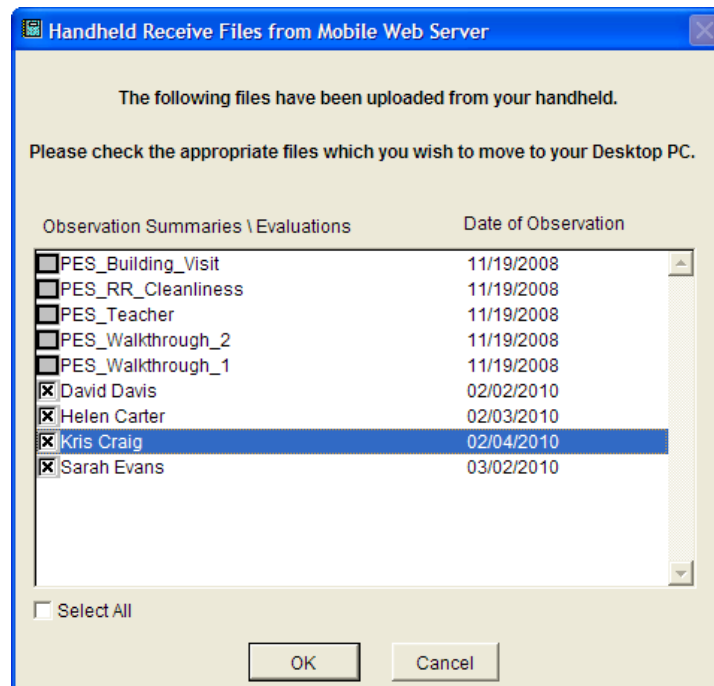


A cautionary dialogue will appear to verify that preferences on the desktop match the type of work being uploaded.



The user should click the **YES** button to begin the download.

All the observation and evaluation files from the user's iPhone will be retrieved to the desktop software. The following dialogue will appear.



The user will most likely wish to move only some of these files to the desktop and should click the checkbox beside the file names of those to be moved. There is certainly no reason to migrate templates to the desktop with each upload.

Especially if the upload moved more than one type of employee, the user should be careful to click the checkbox for only those files consistent with the current active preferences. Using the illustration above, one file is for a teacher while another is for a custodian. The active desktop preferences will determine which uploaded files the user should select.

Users who mistakenly mismatch files when uploading can recover by changing the desktop preferences to match the desired upload and performing the upload a second time. For example, a user who uploads a custodian evaluation when secretarial preferences are active can recover by changing the desktop preferences and uploading the custodial evaluation a second time.

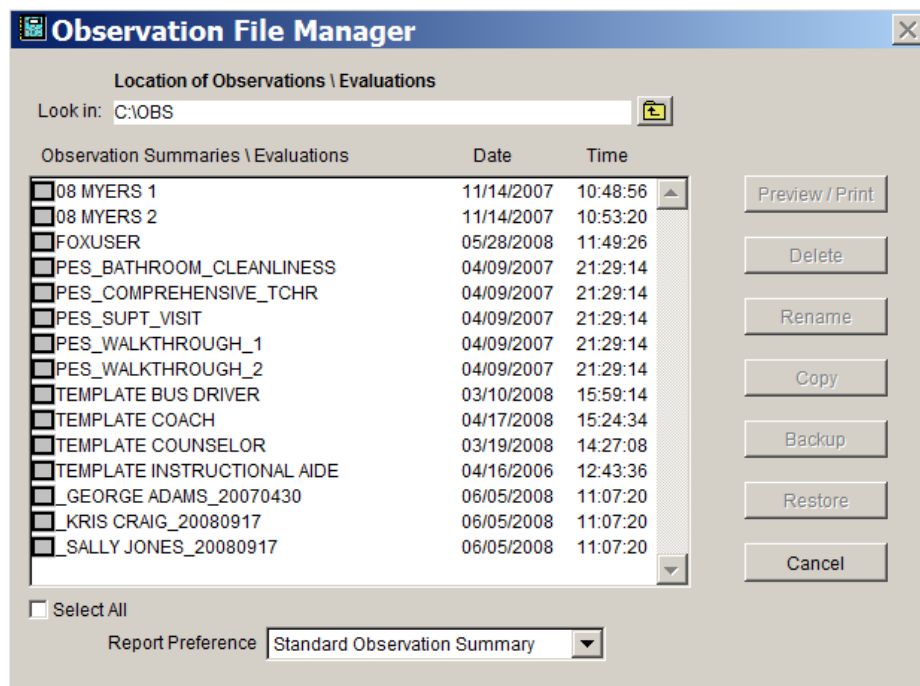
## Working with Retrieved Files

Once retrieved to the PC desktop, observations from the iPhone can be viewed, edited, printed, or archived like any file begun on **The Administrative Observer** desktop.

Three steps are recommended following upload from the handheld.

- Rename the file according to the district's approved file naming protocol.
- Open the file to validate its content or edit if necessary.
- Generate a feedback report to the employee.

To rename, the user should click **FILE | OBSERVATION FILE MANAGER** to activate the Observation File Manager. The following dialogue will appear.



Uploaded files will always appear **at the bottom** of the file listing and will show the employee name followed by a series of numbers. The user should rename uploaded files according to the approved naming protocol.

As retrieved    \_GEORGE ADAMS\_20070430  
-----  
As renamed    11 Adams 1

In the example above, the renaming protocol has three parts.

|                        |   |       |                                   |
|------------------------|---|-------|-----------------------------------|
| Fiscal Year            | = | FY11  | <b><u>Resultant File Name</u></b> |
| Teacher last name      | = | Adams | 11 Adams 1                        |
| serial number of visit | = | 1     |                                   |

After renaming, the user should click **CANCEL** to exit the observation file manager.

To open the file to validate or edit its contents, the user should click **FILE | OPEN** and select the uploaded file as renamed. Review and adjust the content of the file as desired using the procedures detailed earlier in this manual. Following revision, save the edited file.

To generate feedback to the observed employee, the user should click **REPORTS | OBSERVATION REPORTS** and follow the logical prompts. The procedure for report creation is detailed in earlier parts of this manual.

### **If you encounter difficulties**

We encourage all users to explore with curiosity the menus and features found in The Administrative Observer iPhone Edition. We also hope they will consult the product manual and tutorial screencasts accessible from the desktop software HELP menu.

We do not, however, intend for them to be unduly frustrated or for them to endure malfunctioning software. Please contact Preferred Educational Software toll free at 888-959-2016 if you need assistance.

### **Training is available.**

Comprehensive training is available to interested users at nominal cost. Visit <http://www.42regular.com/training> for details.

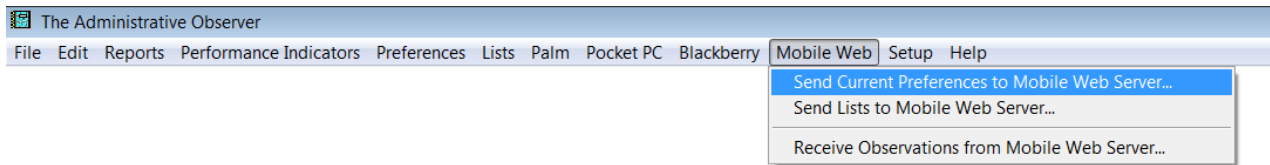
## The Administrative Observer on Android handheld devices

**The Administrative Observer** allows data entry at your convenience using an Android device. Whether used while observing the employee or later while away from the desktop PC, the handheld module greatly increases the convenience of data entry.

A separate license is required for each Android user. To obtain a license, contact the publisher using the e-mail information on the title page to this manual and at <http://www.mobileobs.com>.

**The Administrative Observer Android Edition** is a mobile web application that works in partnership with the desktop software. Users should install the standard edition desktop program from CD then update to the most current version promptly. Version 5.24 or higher of the desktop software is required to support the Android edition.

Operation of **The Administrative Observer** is conceptually parallel on all supported handheld devices. The desktop menu bar has separate but similar dropdown menus for each.



There are, however, interface differences specific to each device. For this reason, separate sections of this manual will describe installation and operation on each handheld type.

## Supported Handheld Devices

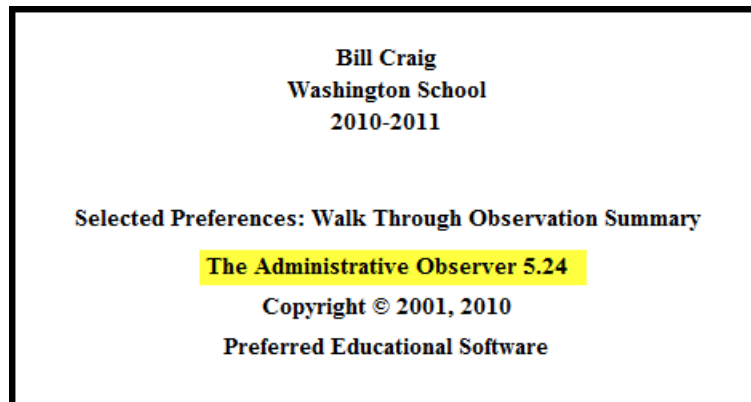
|                      |   |
|----------------------|---|
| Blackberry           | <p>Most models including ...<br/>Curve, Bold, Tour, Pearl, World Edition and Storm</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - 4.2.1 or later</p>              |
| <u>iPhone</u>        | <p>All generations of iPhone, iPod Touch, and iPad</p> <p>Utilizes <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Windows<br>Mobile    | <p>Most handhelds including ...<br/>HP iPaq series, Dell Axim series, Treo series</p> <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Windows Mobile 2003 or later</p> |
| Android              | <p><b>Most models utilizing Mobile Web version -</b><br/><a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |
| Palm                 | <p>Most models including Tungsten, TX, Centro, Treo series<br/>Palm Pre/Pixi utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p> <p><u>Operating System</u> - Palm OS 3.5 or later</p>                                 |
| Other<br>smartphones | <p>Most models utilizing <b>Mobile Web</b> version - <a href="http://www.mobileobs.com">www.mobileobs.com</a></p>   |

## Initial Setup and License Registration

Four setup steps are needed prior to first use.

1. Update your desktop software to version 5.24 or higher. This essential update is **free** to registered users.
2. Register your license for the Android Edition.
3. Configure the desktop software using the login ID and password assigned during license registration.
4. Send your preferred content and lists to the mobile web server for use with the Android Edition.

Step 1. Start The Administrative Observer on your desktop. Your version number will be shown on the screen as illustrated below. Your desktop software must be version 5.24 or higher to support the Android edition.

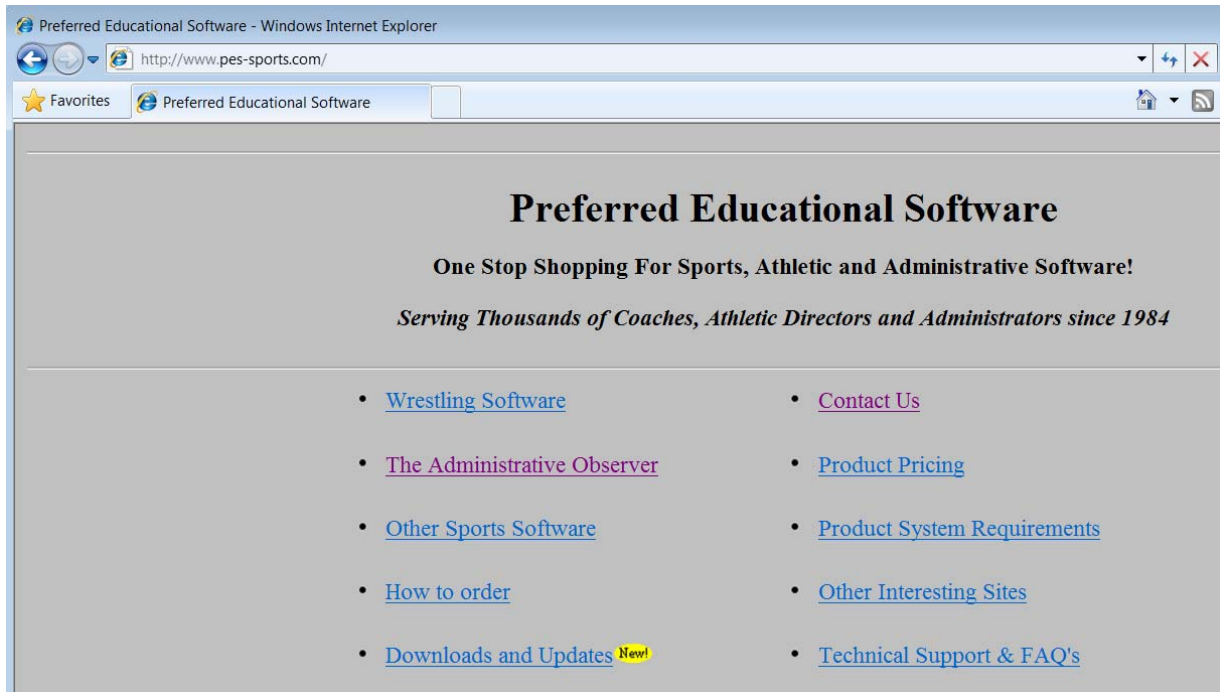


Prior to upgrade, users who have customized their preferences, lists, or templates should backup that content to a safe, known location so it can be restored after the upgrade. New users who have not yet customized preferences or created lists or templates can safely skip this step.

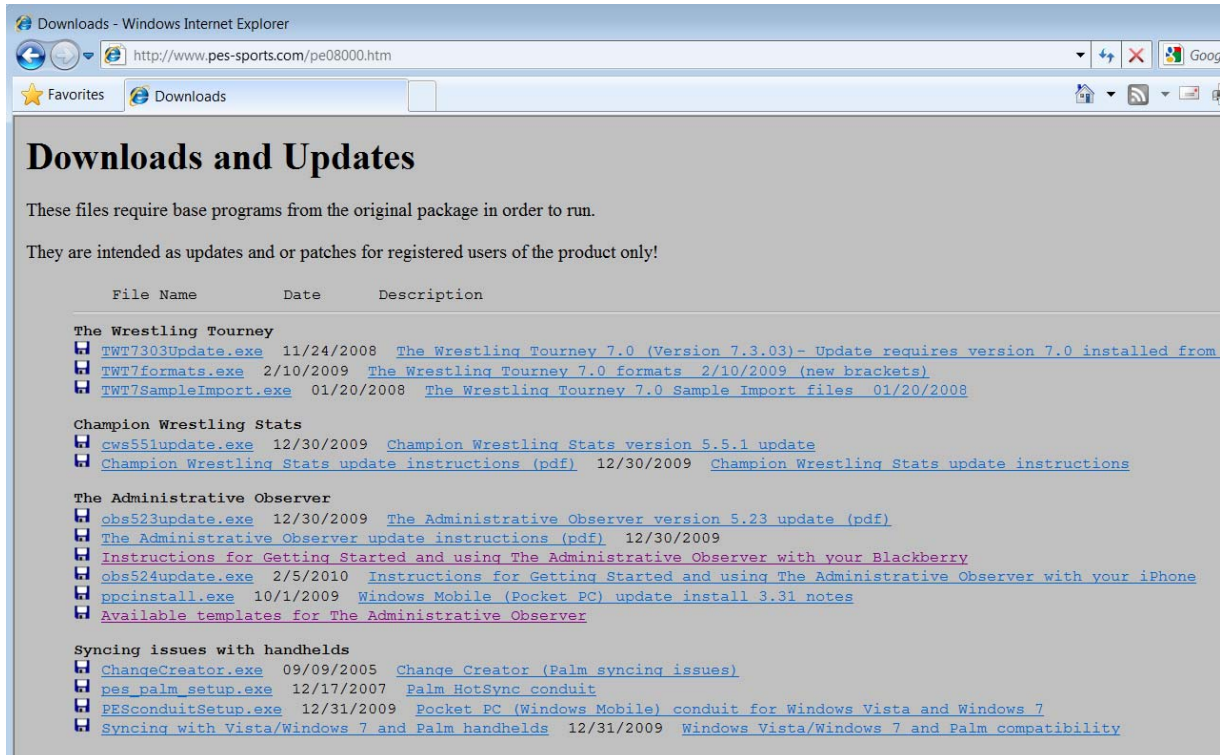
The procedures to backup and restore preferences, lists, and templates are described in detail elsewhere in this manual.

| <b><u>Task</u></b>           | <b><u>Page Reference</u></b> |
|------------------------------|------------------------------|
| Backup / Restore Preferences | pp. 30 – 31                  |
| Backup / Restore Lists       | pp. 42 – 43                  |
| Backup / Restore Templates   | pp. 68 – 69                  |

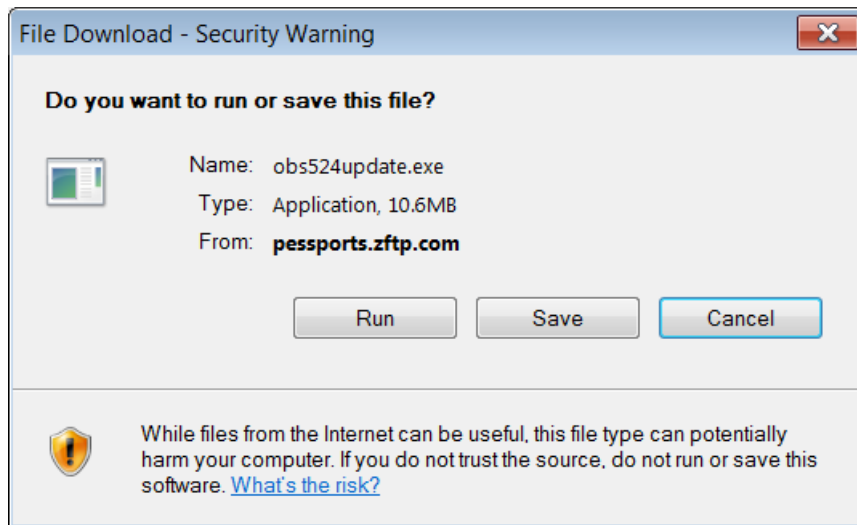
To proceed with the update of your existing desktop software to version 5.24 or higher, use your desktop browser to visit: <http://www.pes-sports.com>



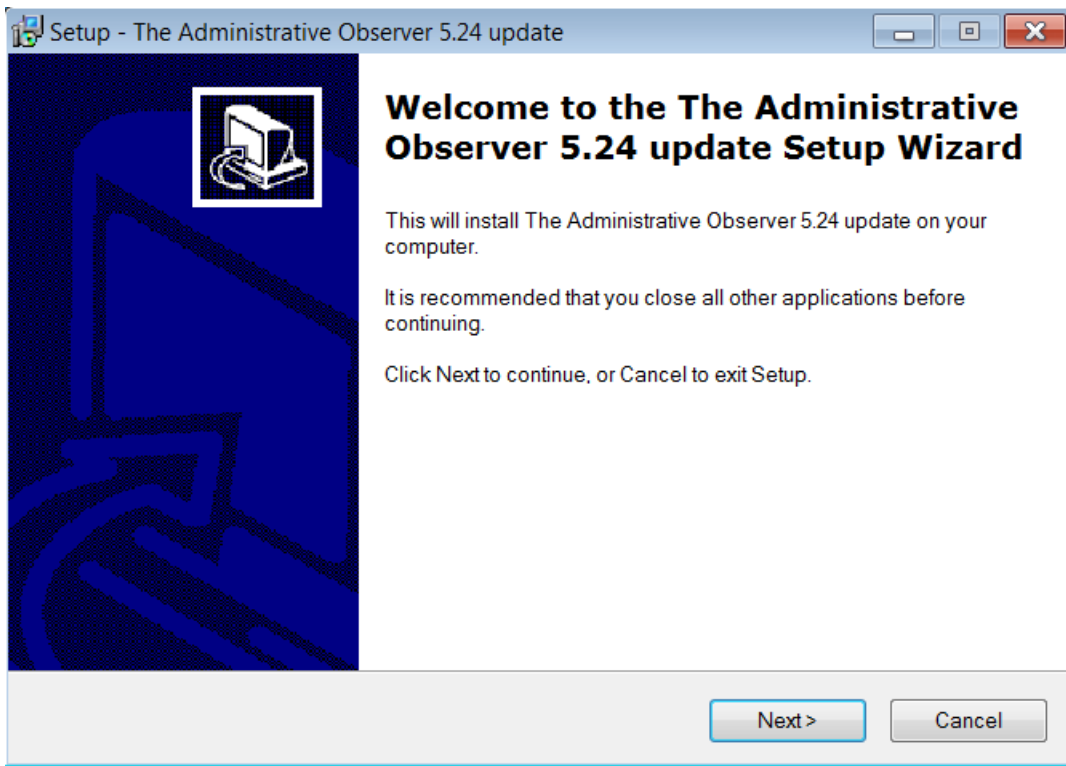
Click on Downloads & Updates, then scroll to the section titled The Administrative Observer.



Choose the file named obsXXXupdate.exe where XXX indicates version number 524 or higher. SAVE this file to your desktop or other known location.

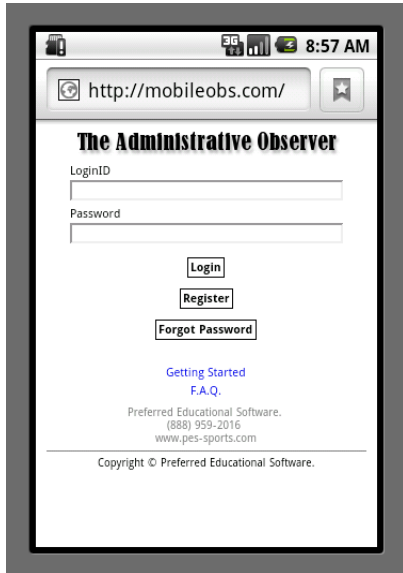


Once downloaded, close all programs and double-click the update wizard. Accept the prompts as given.



When the wizard has completed your update, import or restore all preferences, lists, or templates you backed up earlier. With that job complete, your desktop software will be ready for use with the Android edition.

**Step 2.** Visit <http://www.mobileobs.com/> to register your Android edition license. This can be done on your Android or with your desktop browser.



Click the **REGISTER** icon on the initial screen. A form will appear requesting your information.

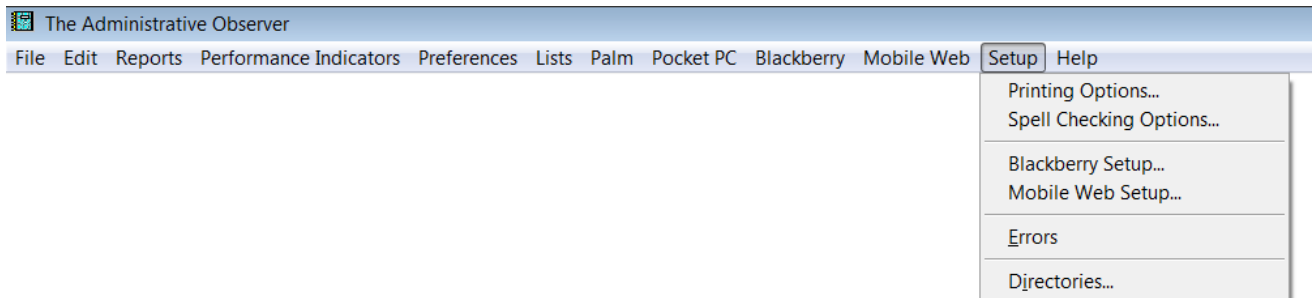
Complete all areas, then click REGISTER when finished.

A login ID and password will be emailed to you within 24 hours.

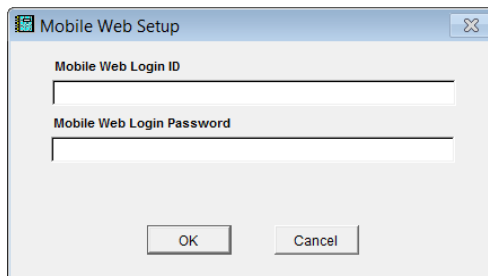
Incomplete information will delay license registration.



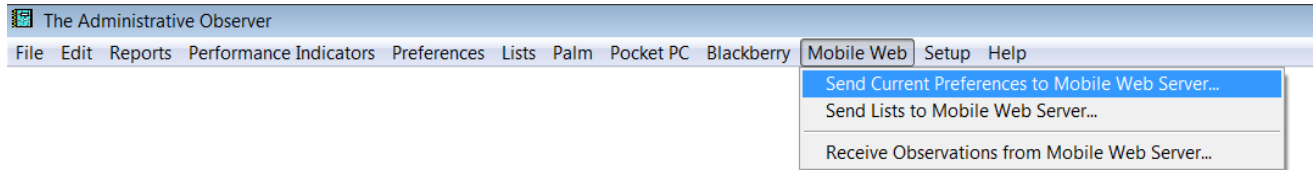
**Step #3.** When you receive the login ID and password assigned following license registration, open the desktop software and choose SETUP from the menu bar.



Choose Mobile Web Setup, then enter the assigned login ID and password. This information allows the desktop software to work in partnership with your Android.

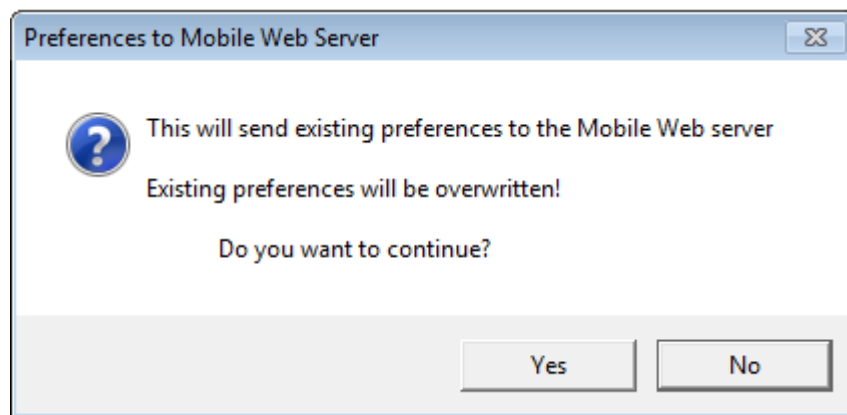


**Step #4.** Using the desktop software, configure your preferences and popup lists to your liking (see manual pp. 42 – 43 for details). When ready, upload that material to the Mobile Web Server for use on your Android. Open the desktop software and choose MOBILE WEB from the menu bar.



In turn, choose SEND PREFERENCES ... and SEND LISTS ....

In each case, a cautionary dialogue will appear asking if you are sure. Unless you arrived at this point by accident, respond by clicking YES.



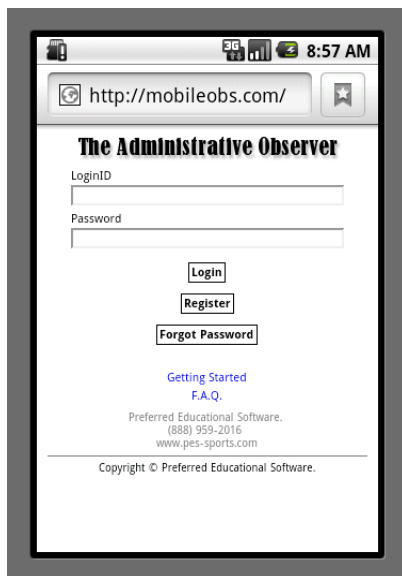
The Administrative Observer Android Edition is now ready for use on your Android at <http://www.mobileobs.com/>

## Operation of The Administrative Observer on an Android Device

The Administrative Observer Android Edition is a mobile web application accessed via the browser in your Android. The mobile web server temporarily stores your observation thoughts. At your convenience following the observations, use the desktop software to download this data for report creation and analysis.

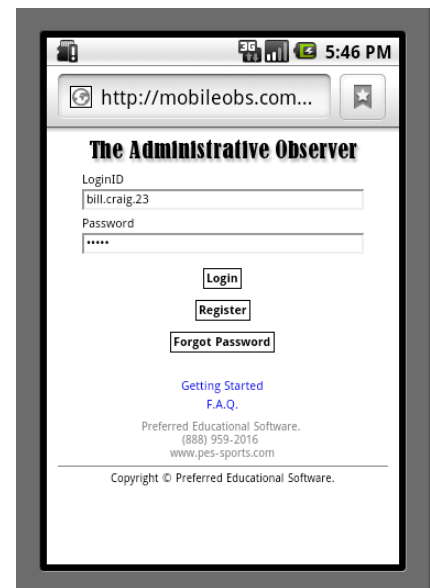
Importantly, the mobile web server is meant for temporary storage of your collected data. Up to twenty observations can accumulate on the mobile web server. At that point, however, no more observations can be completed until the existing observations are downloaded to the desktop software and deleted from the server to make room for new observations. Users are encouraged to download and delete observations from the server before reaching the twenty observation limit.

### Overview

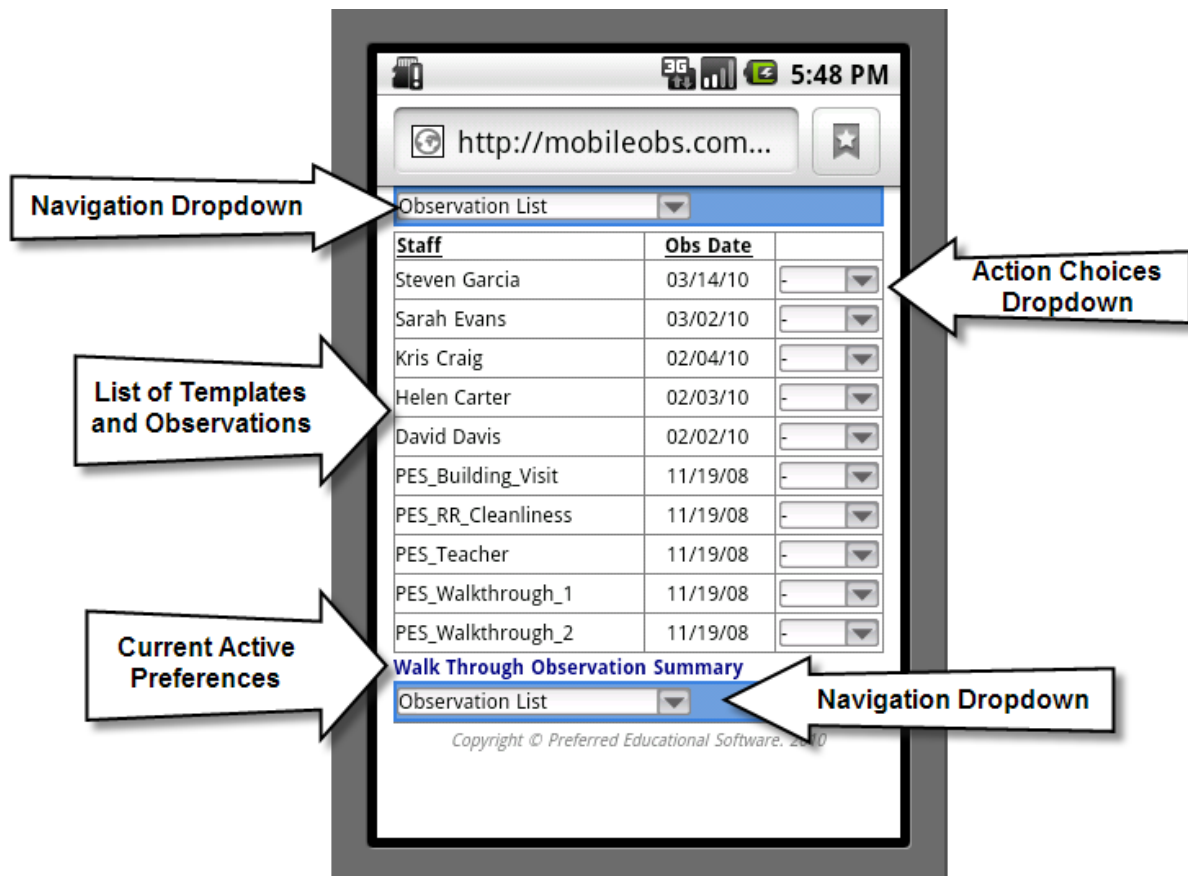


Visit <http://www.mobileobs.com/> and enter your login ID and password as assigned.

Tap Login when ready.



The initial screen for The Administrative Observer Android Edition will appear. Page segments are detailed below. It is important to note that current preferences will always be shown immediately above the lower navigation dropdown, not in the files listing.



**The Current Active Preferences** are your preferred starting pointing language uploaded to the mobile web server from your desktop software. This language will be used whenever the user selects NEW OBSERVATION from the **Navigation Dropdown** and should therefore be the language you plan to use most often.

**The List of Templates and Observations** shows observations currently in temporary storage on the mobile web server. They should be downloaded to your desktop for report creation and archiving. Templates are also shown in this listing. Templates contain starting point language that is used occasionally. Treat templates as master documents that are never used directly. Copy a template, then use the copy.

**The Navigation Dropdown** appears above and below the files listing for your convenience. Its content varies according to your task context. While viewing the initial observation screen list shown above, the choices available are ...

| <u>Function</u>         | <u>Comment</u>   |
|-------------------------|--|
| New Observation         | Begin new observation using active preferences                             |
| Observation List        | View the list of observations and templates                                |
| Delete All Observations | Use care – also deletes templates!   |
| Change Password         | <u>Important:</u> remember to configure desktop software with new password |
| Log Out                 |  |

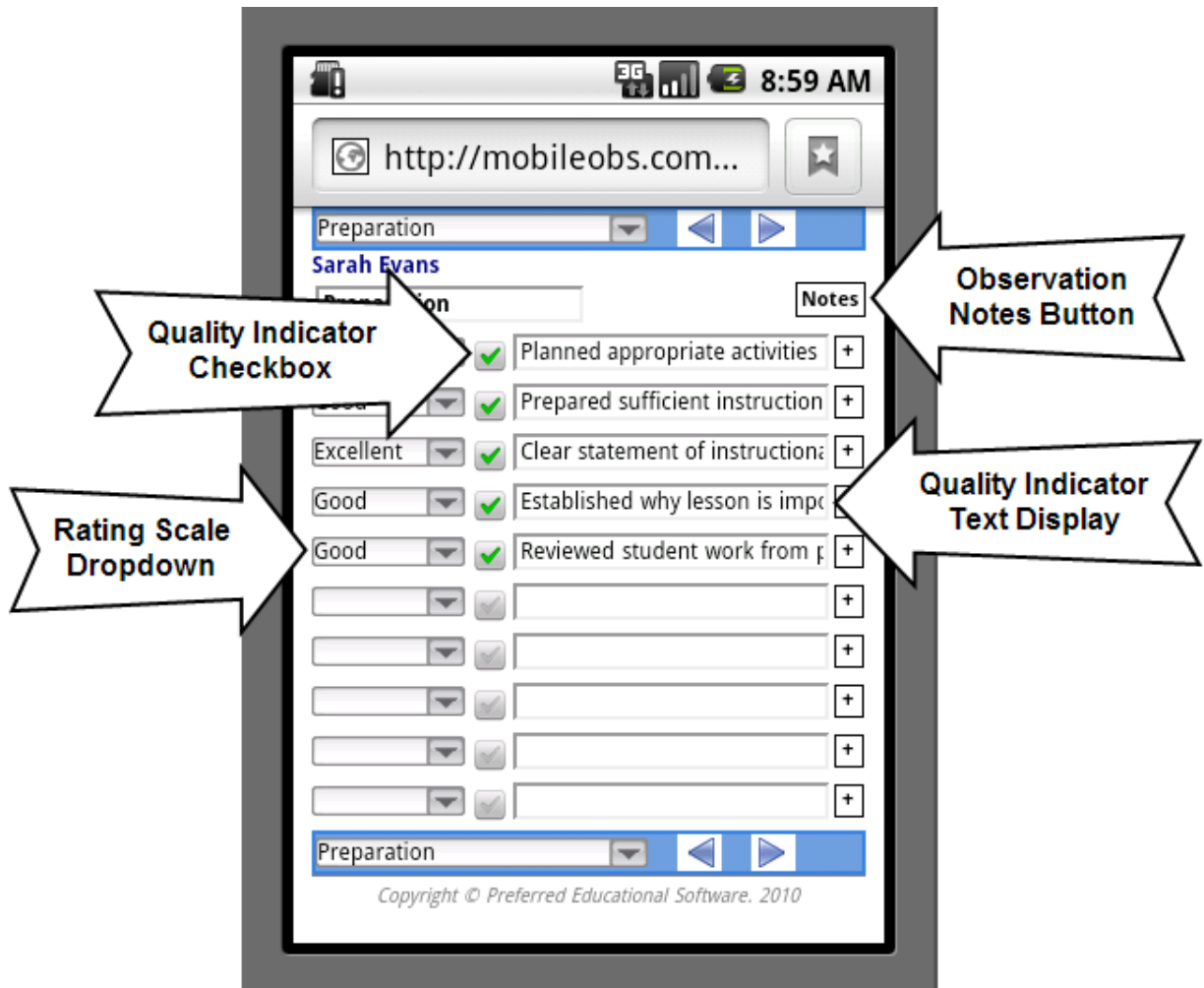
When completing an observation, the navigation dropdown choices change to fit that context.

| <u>Function</u>  | <u>Comment</u>                                    |
|------------------|---|
| Next             | Move to NEXT segment                              |
| Previous         | Move to PREVIOUS segment                          |
| Introduction     | First segment for a new observation               |
| Segments 1-6     | Jump to the desired segment                       |
| Closing          | Enter comments in two closing areas.              |
| Settings         | Adjust a variety of settings.                     |
| Observation List | Return to the initial screen                      |
| Logout           | Leave The Administrative Observer Android Edition |

**The Action Choices Dropdown** is shown only while viewing the observation list screen. Action choices available are shown below.

| <u>Function</u> | <u>Comment</u>  |
|-----------------|---|
| Open            | Allows adjustment to a template or continued work on an observation begun earlier   |
| Copy            | Especially useful with templates. Always COPY a template. Use the copy.   |
| Delete          | Observations should be DELETED following download to your desktop software. Deleted observations cannot be recovered, so be sure to download first. |

Every data entry screen will contain similar components on an Android.

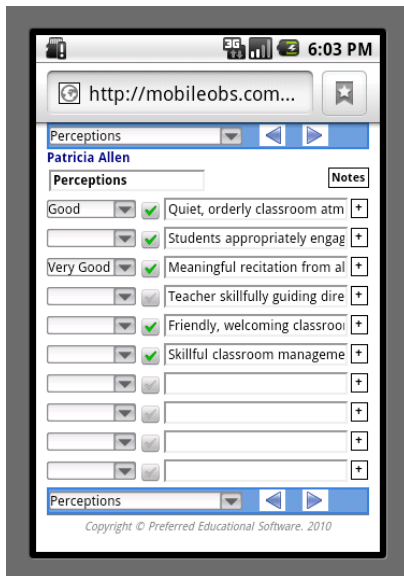
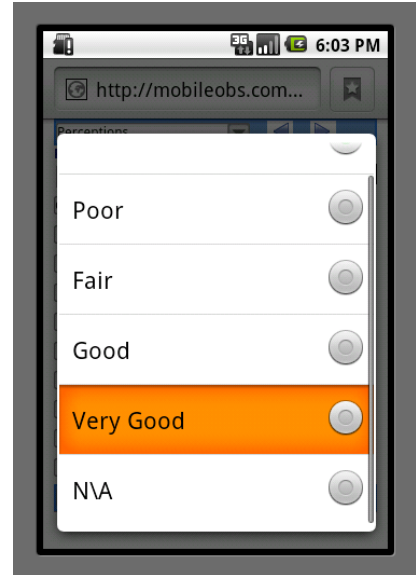


The four parts of each data entry screen are

1. the Quality Indicator checkbox,
2. the Rating Scale dropdown box,
3. the Quality Indicator text display, and
4. the Observation Notes button.

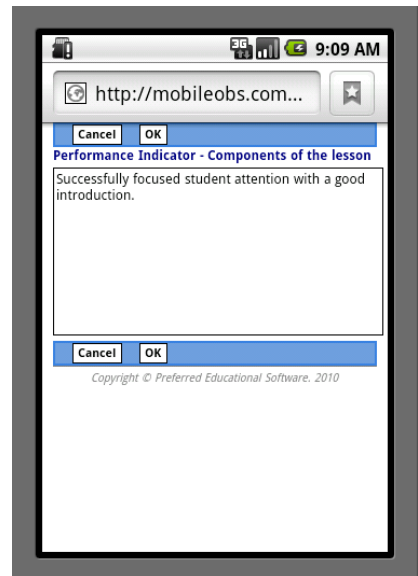
The **Quality Indicator checkbox**  allows the user to turn on and to turn off any quality indicator desired. A check in this box means the quality indicator is active and will be reflected in the observation or evaluation document.

The **Rating Scale** drop down box allows the user to indicate how well a particular quality indicator was performed.



The **Quality Indicator text** displays the beginning portion of quality indicator as in the screen on the left. This will most often be enough for an experienced user to know the full text.

There will be times when the user wishes to view or change the text of the quality indicator. For this, tap the “plus” icon to the right of the text to be changed. The screen at right will appear. Review or edit the text as desired, then tap OK.



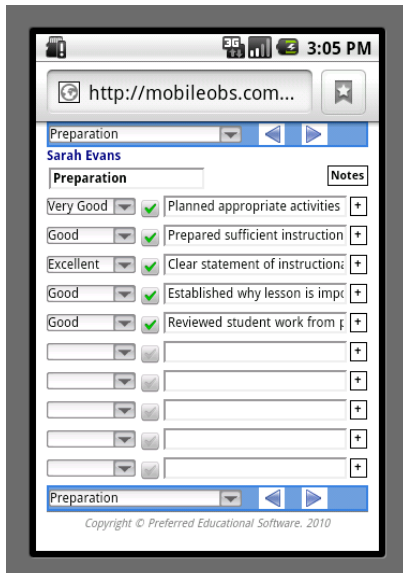
## The Observer Notes button

The user may elect to enter **NOTES** for each section of the observation record. **NOTES** are meant to be somewhat brief, a couple of sentences as opposed to an essay. Several possibilities exist.

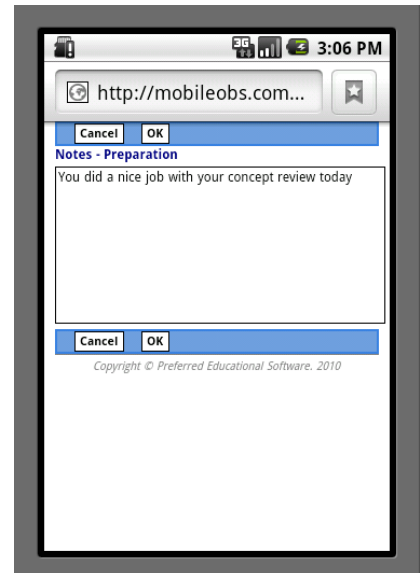
If **NOTES** are not entered on the Android, the paragraph text of the desktop preferences will appear unaltered.

If **NOTES** are entered, and if **no** paragraph exists on the desktop preferences, the NOTES will appear in the place of the missing paragraph.

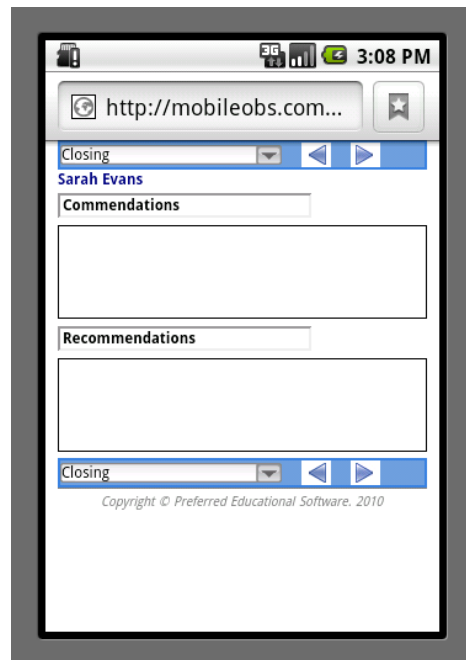
Finally, if **NOTES** are entered, and if the desktop preferences do contain paragraph text, the NOTES will be appended to the end of that text. This is the most likely situation the user will encounter.



To view or change the **NOTES** text for each observation segment, tap the NOTES icon. The screen at right will appear. Review or edit the text as desired, then tap OK.



The **CLOSING** tab does not contain the same components as the other data entry screens on the handheld.



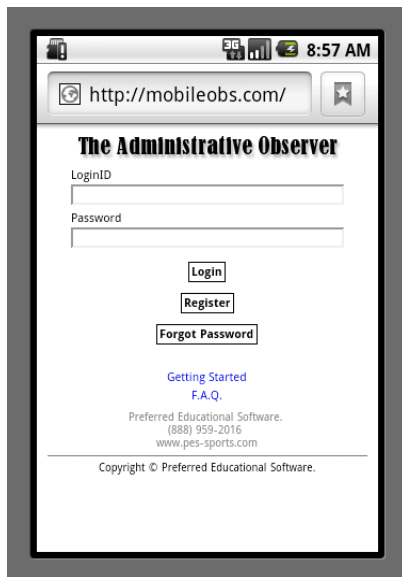
Text for the Commendations and the Recommendations can be entered directly by typing. Users more comfortable with the desktop PC keyboard can edit or complete these sections after transfer to the desktop if desired

## **Before Completing Your First Observation**

For increased convenience, we recommend two actions even before you record your first observation:

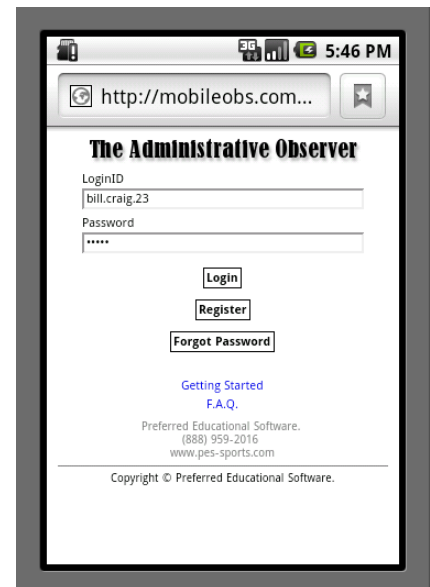
- change your password, making it easy to remember but known only to you, and
- create an Android shortcut to your application.

### **Changing your password.**

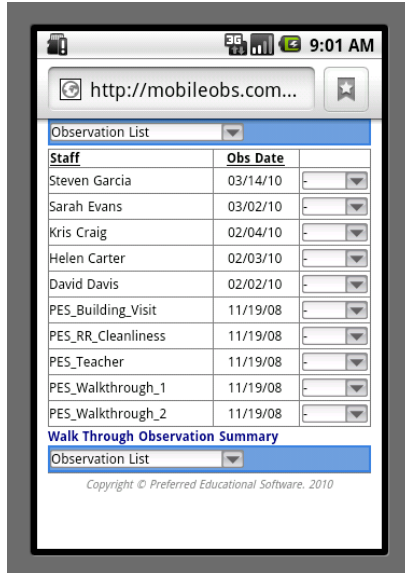


Visit <http://www.mobileobs.com/> and enter your login ID and password as assigned.

Tap Login when ready.



The main screen for The Administrative Observer Android Edition will appear.

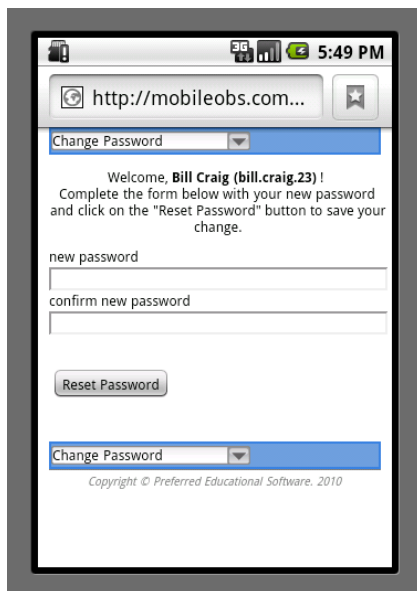
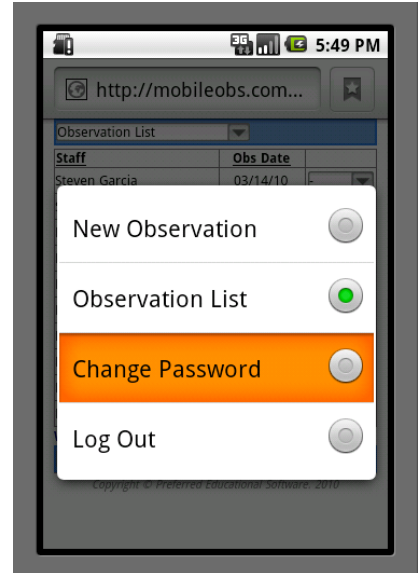


The center of the screen displays completed observations and available templates.

Current active preferences are displayed just below this list.

A pop-up list above and below the observation list contains all navigation choices.

Tap the pop-up list, then tap Change Password.



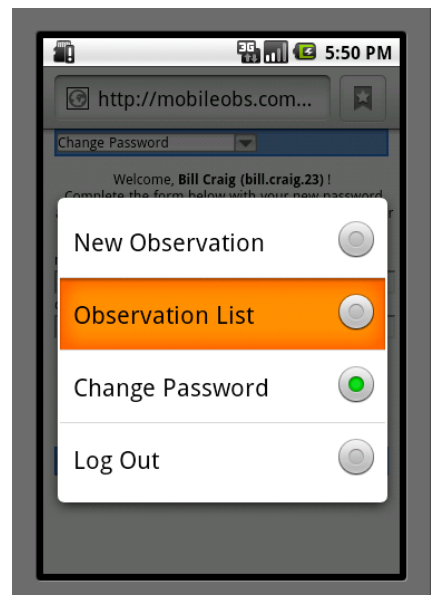
The Change Password screen will appear.

Enter and confirm your new password as prompted. Tap Reset Password when done.

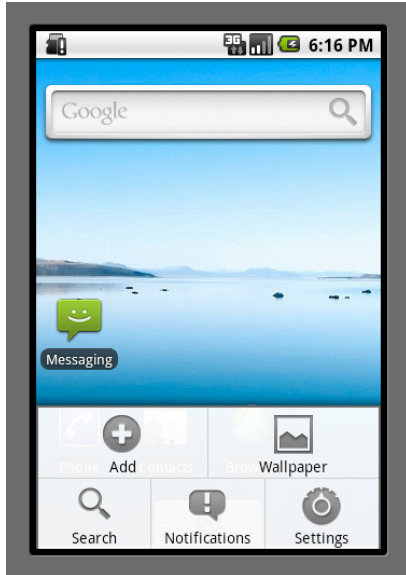
Your new password is now active.

**Very Important:** Remember to configure your desktop software with this new password.

To leave this screen without changing your password, tap the pop-up list and navigate back to the Observation List.



Creating an Android home screen shortcut to your application.

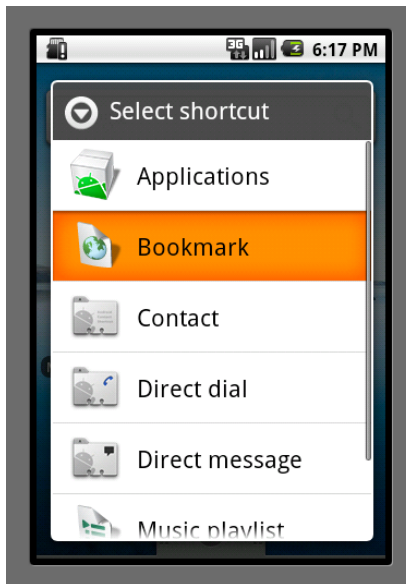
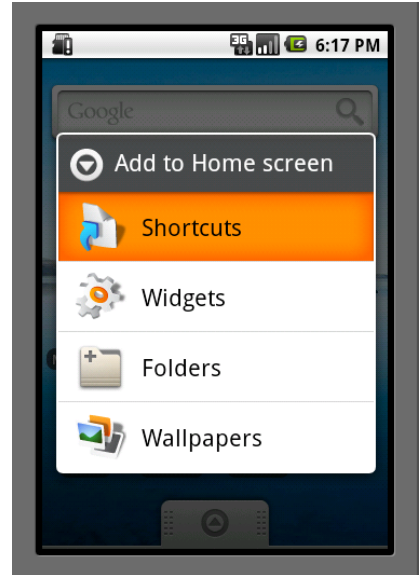


Visit <http://www.mobileobs.com>

The screen at left will appear.

Tap the MENU button on your Android, then tap the ADD option.

Select SHORTCUT.

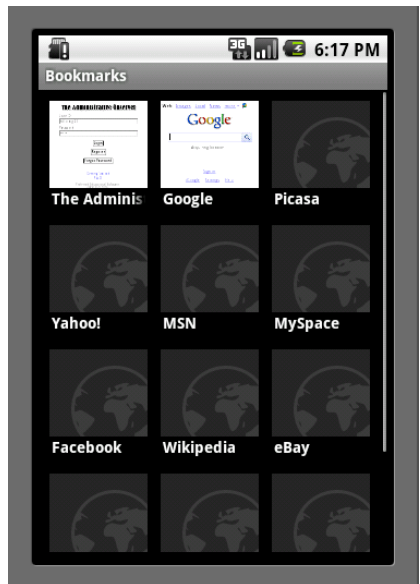


Select BOOKMARK on the next screen.

Tap the icon for The Administrative Observer.

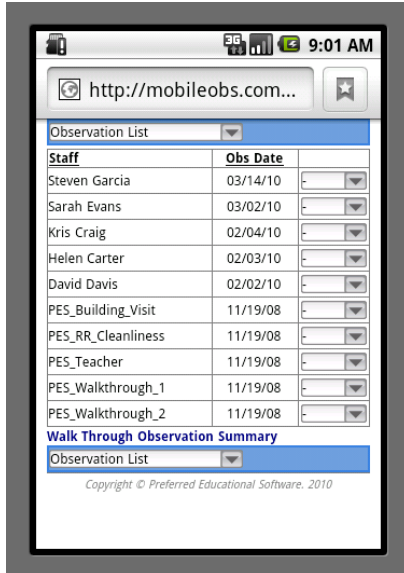
A shortcut will be added to your Android home screen.

Tap the new shortcut for easy direct access to The Administrative Observer Android Edition.



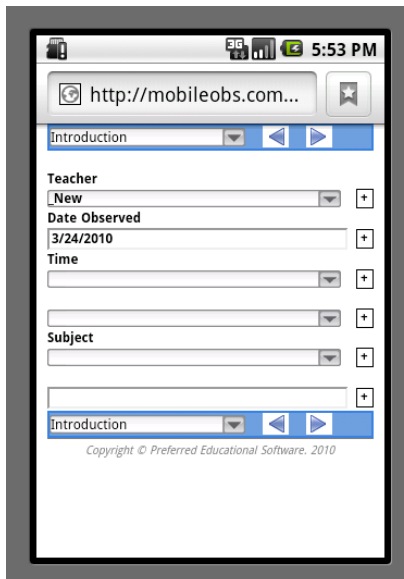
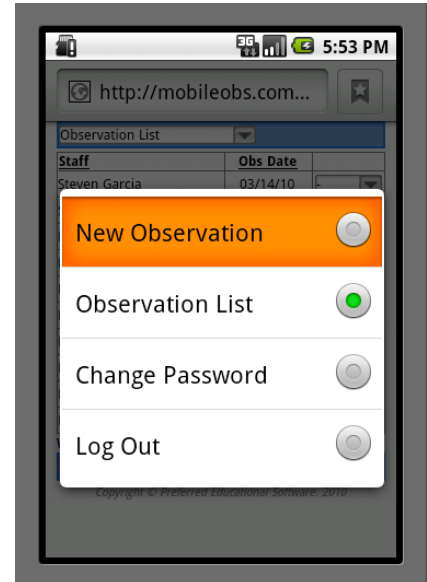
## Creating a NEW observation or evaluation on the Android

Access The Administrative Observer Android Edition using your home screen shortcut. After log in, the main screen will appear.



Tap the navigation pop-up list where “Observation List” currently appears.

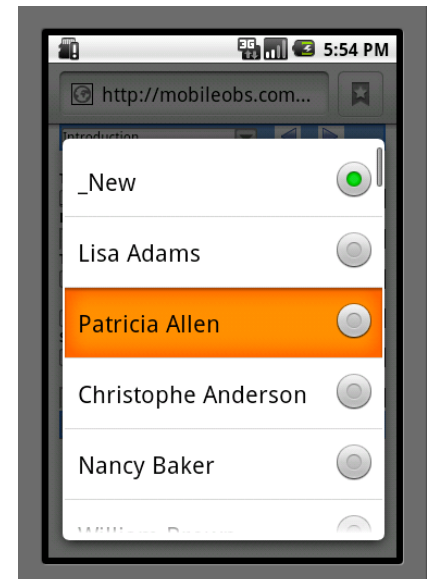
Tap the option to create a new observation.



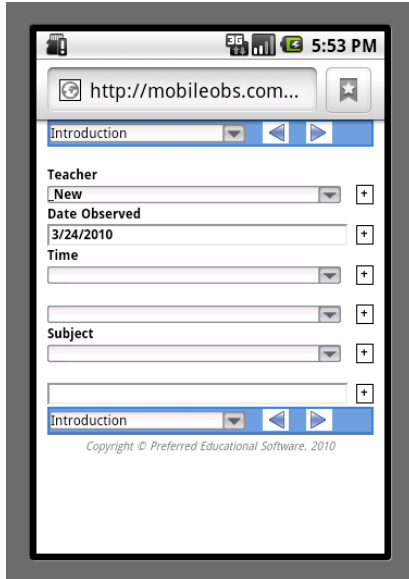
A new blank observation will appear, based on preferences you uploaded earlier.

The teacher name is shown as “\_New” Tap the teacher name pop-up list to choose an actual teacher from your faculty.

Tap the appropriate teacher name. The staff member name will become the file name on your Android main screen.



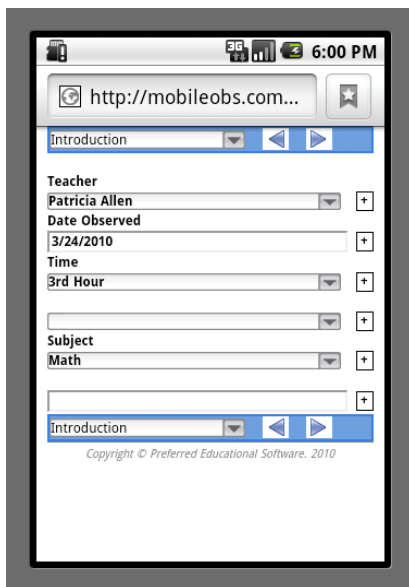
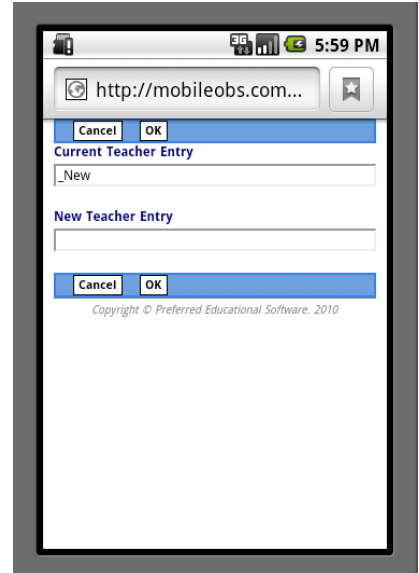
For a teacher not shown in your pop-up list, you can enter the name directly.



The teacher name is shown as “\_New” Tap the “+” icon to the right of the pop-up list to enter a name.

Tap the area for “New Teacher Entry” and enter the name desired.

Tap OK to confirm, or Cancel to exit with no entry.

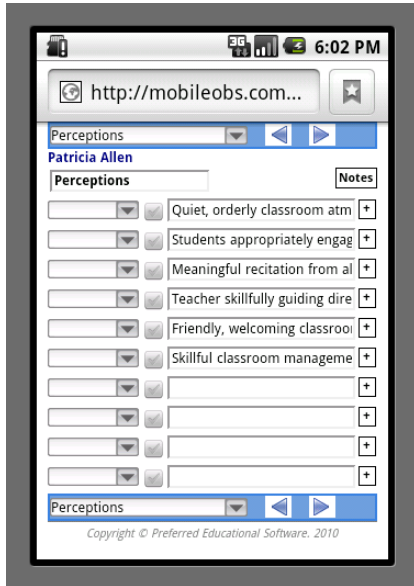


Having entered the teacher name, complete the remaining areas on the INTRODUCTION segment in similar fashion.

Tap INTRODUCTION in the navigation pop-up list, then tap PERCEPTIONS to move to that segment.



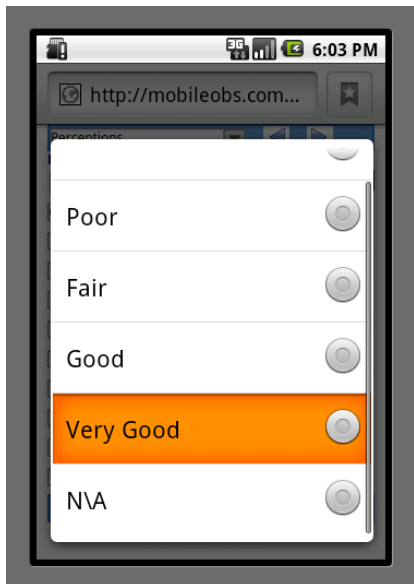
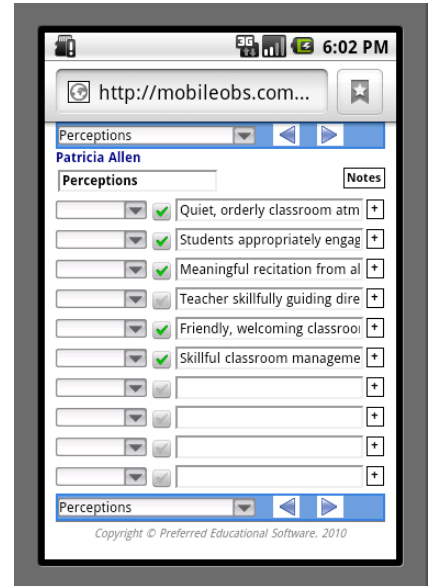
The PERCEPTIONS segment will appear. Note that your segment title may be different according to the preferences you uploaded.



Tap the small square icon to the left of each observed teaching standard. A check mark will appear.

Items not observed should not be tapped.

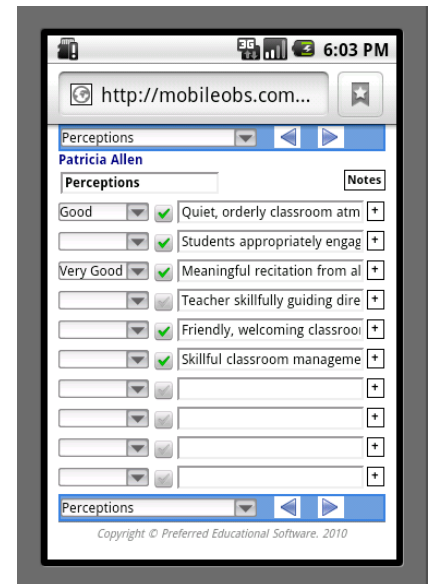
Tap a second time to remove a check mark entered by accident.



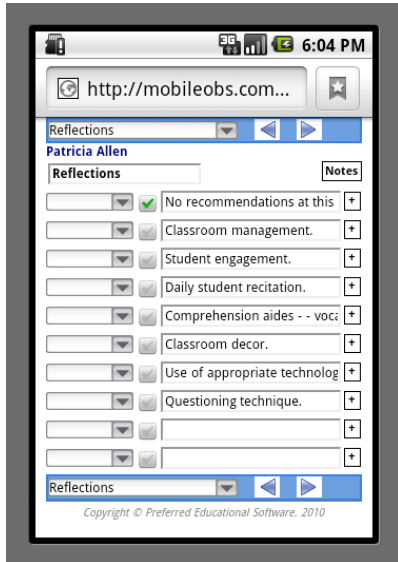
For each checked item, you have the option to enter a rating. Local policy will determine if ratings are used.

To enter a rating, tap the pop-up to the left of a check mark and choose the appropriate rating.

It can be appropriate to rate some items and not others.

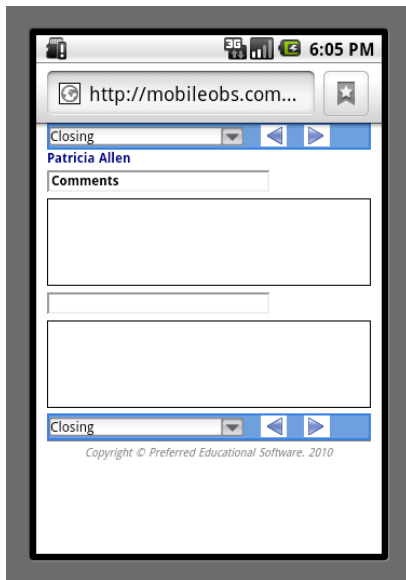
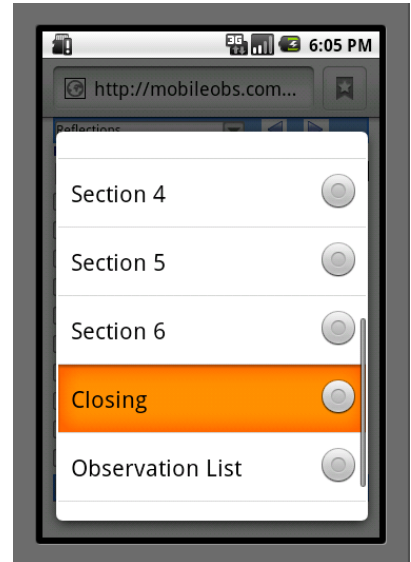


Tap the Navigation pop-up list, and choose the Reflections segment. Your segment title may be different according to the preferences you uploaded.

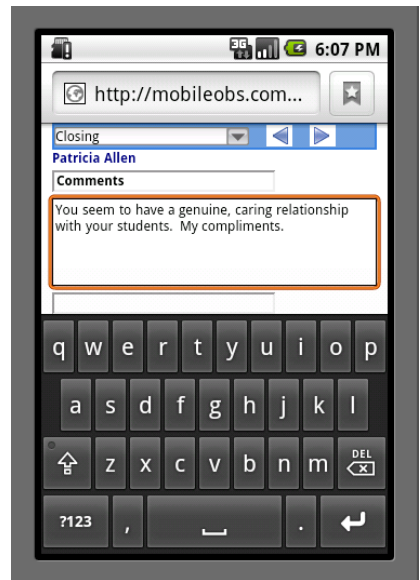


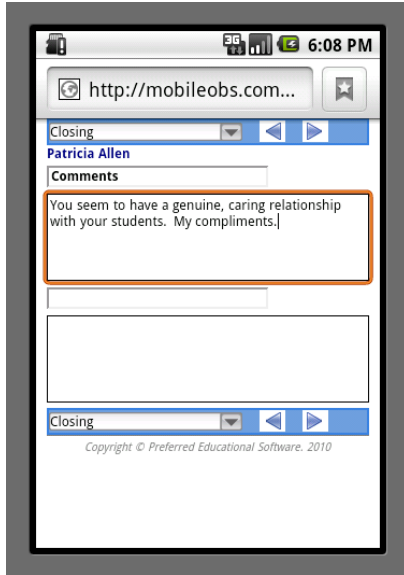
Tap the small square icon to the left of each item you want the teacher to consider for improvement. A check mark will appear.

When all reflection items have been indicated, tap the word REFLECTIONS in the pop-up list. Choose the CLOSING segment.

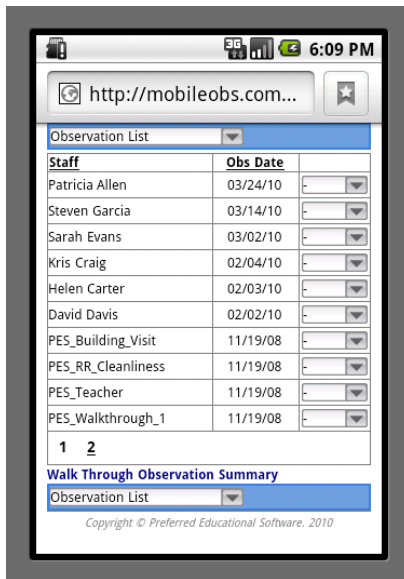


An area to enter comments will appear. Tap the text entry area, then express your comment.





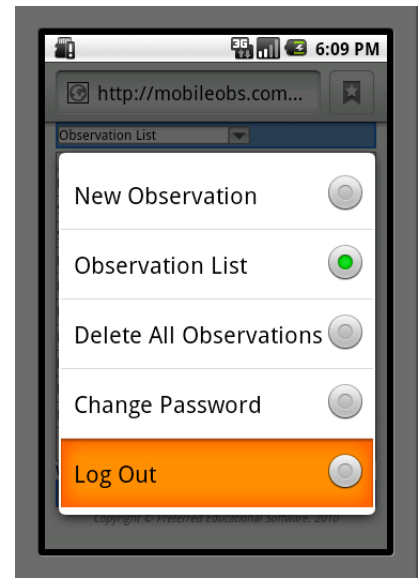
Having completed the record of your observation thoughts, tap the navigation pop-up list and choose Observation List.



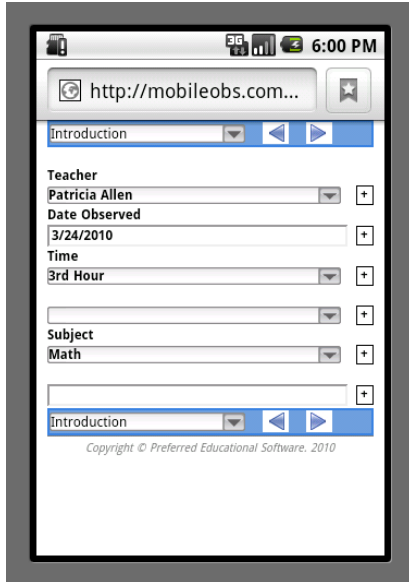
The name of the teacher for whom you completed this observation will appear in the main screen list.

Tap your pop-up navigation list and choose Log Out.

Your observation is now stored on the mobile web server, awaiting download to your desktop software for final editing (if any) and report creation.



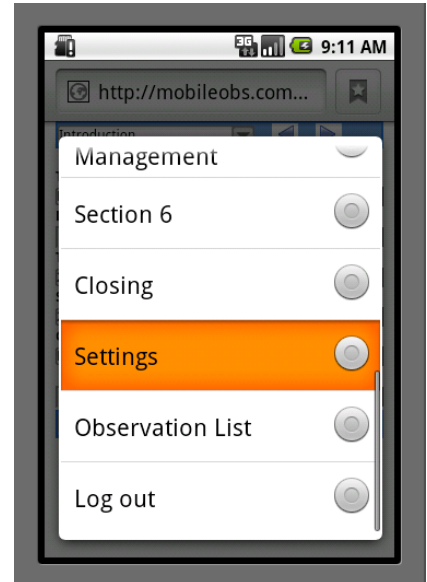
The **SETTINGS** for Report & Title Choices, the Observation Rating Scale, and Observer Information are typically entered on the desktop software and downloaded to the Android. To change these settings for a particular observation on the Android, move the INTRODUCTION screen.



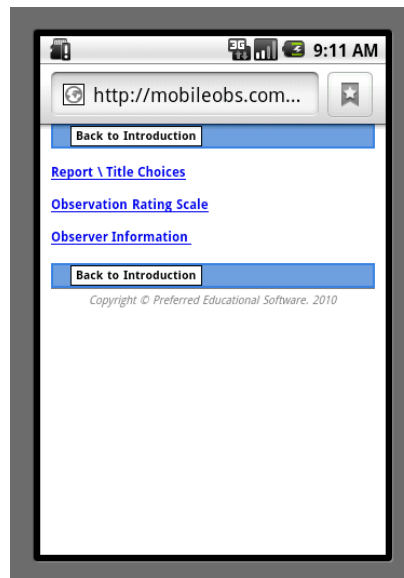
It is important to note that **SETTINGS** for a particular observation on the Android can be changed only from the INTRODUCTION screen.

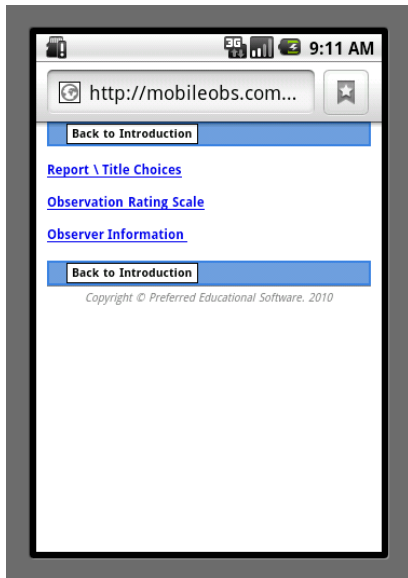
While on the INTRODUCTION screen, tap the NAVIGATION dropdown and choose **SETTINGS**.

The subsequent screen will reveal areas that can be adjusted.



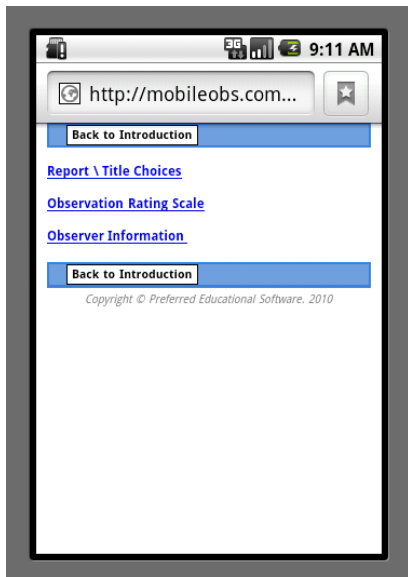
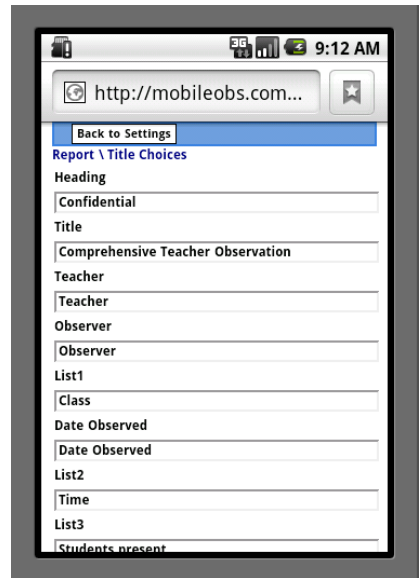
Changes will be effective for the current appraisal only and will not affect the user's desktop defaults.





Tapping **REPORT \ TITLE CHOICES** will reveal the screen at right.

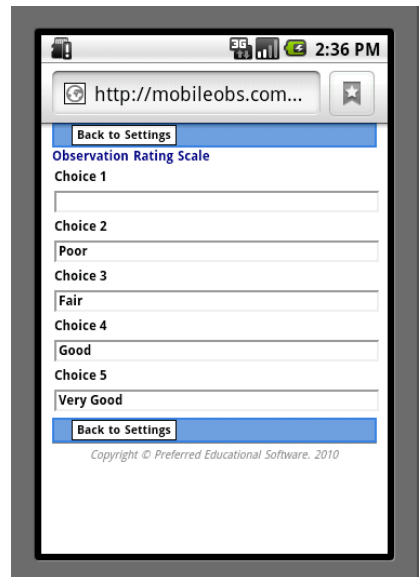
The user can change any displayed option. Keep in mind these are ***titles*** of sections, not the actual content of the section.

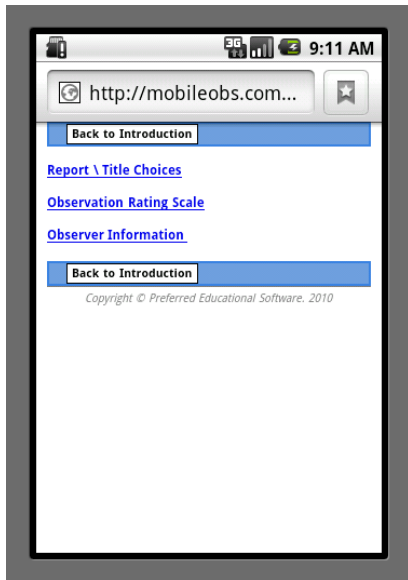


Tapping **OBSERVATION RATING SCALE** will reveal the screen at right.

The full text of the observation rating scale is shown and may be changed.

The changes will affect the current observation only, not the preferences that were uploaded from your desktop software.

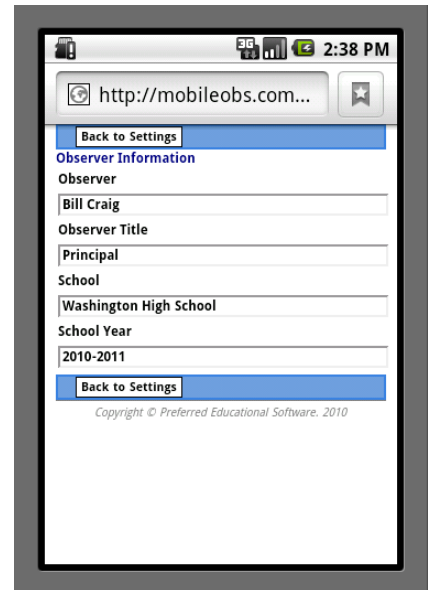




Tapping **OBSERVER INFORMATION** will reveal the screen at right.

As with other screens in the SETTINGS area, the user can adjust any displayed information.

The changes will affect the current observation only, not the preferences that were uploaded from your desktop software.



## Using Templates on the Android Handheld

Templates can be particularly useful on handheld devices. Without templates, the user will have to download fresh preferences whenever the job category of the person being observed or evaluated changes. With templates, however, evaluations of many different individuals with different job categories are possible.

To create and use templates on the Android, the user must prepare preferences for each desired job category on the PC desktop.

**Illustration:** A template for an elementary school teacher will be created. These same steps would be used to create a template for any job category

- From the desktop menu bar, choose **Preferences | Select Educational Default Preferences | Teacher Preferences | Elementary School**.
- Choose **Preferences | Edit Preferences** to edit the elementary teacher preferences to reflect the standard language you prefer.
- Save the edited preferences.
- Upload the preferences to your handheld device.
- On the handheld, open a new observation. Instead of person's name, enter the name Template Elementary. Click **SAVE** without completing any part of the data entry.
- Repeat the process for every job category you might use frequently.

**IMPORTANT:** Copy the template. Use the copy. Treat your template as you would a master document that is always copied but never used.

To use the template as a starting point for an observation of Alice Johnson, for example, use the **COPY** feature from the action dropdown to the right of the template. Choose "Alice Johnson" as the teacher name in the copied file.

Some handheld users find having a series of templates on the device to be more efficient than uploading preferences each time observations for a new job category are begun.

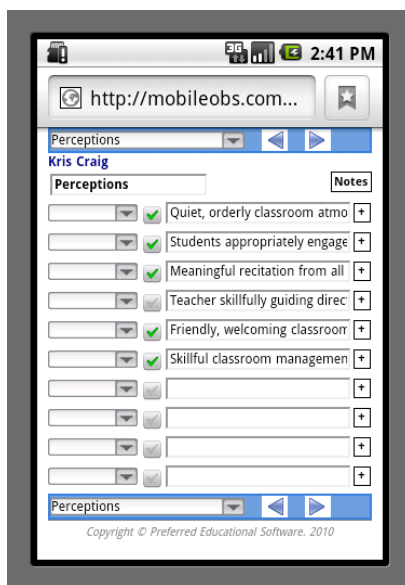
Always treat your template as a read-only master document. Copy the template. Use the copy.

## Walkthrough Observations using an Android handheld device

The purpose of the handheld version of **The Administrative Observer** is to increase convenience for users, a purpose readily achieved when the program is used for brief observation visits commonly known as “walkthroughs.”

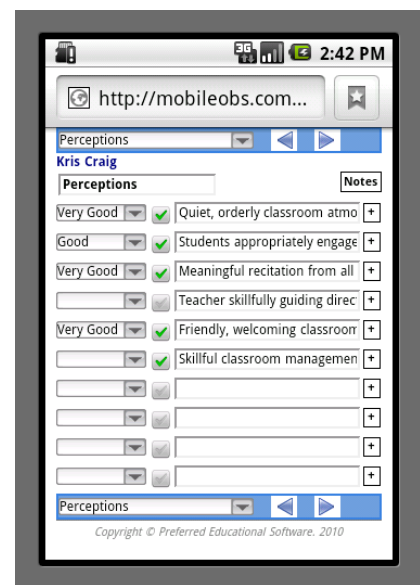
The recommended technique for using **The Administrative Observer** for walkthroughs involves

- Creating a set of “walkthrough” preferences, often using just one or two tabs with a smaller set of quality indicators
- Uploading the walkthrough preferences to the handheld
- Using the walkthrough preferences on the handheld to record your observations
- Downloading the completed observation to the desktop software for final editing and printing.



One technique (left) often used during a walkthrough observation involves using a blank rating (replace “POOR” with a blank, for example), then activate the checkmark to indicate only the behaviors observed.

A different technique is to rate the observed teacher on each quality indicator as shown on the right.



## Retrieving observations from the Mobile Web Server

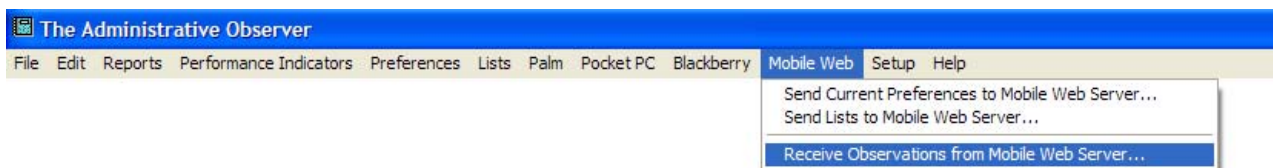
When ready, your observation files can be retrieved by **The Administrative Observer** desktop software for viewing, editing, printing, or archiving.

**Please Note:** The mobile web server is meant for temporary storage of your collected data. Up to twenty observations can accumulate on the mobile web server. At that point, however, no more observations can be completed until the existing observations are downloaded to the desktop software and deleted from the server to make room for new observations. Users are encouraged to retrieve and delete observations from the server before reaching the twenty observation limit.

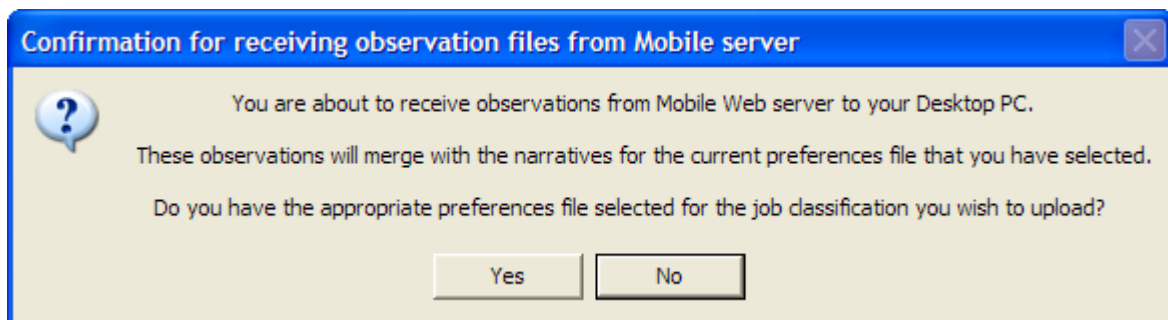
It is **important** for the active preferences on the desktop to match the preferences on the handheld if the desktop preferences contain any paragraph narrative. This is not important if you are concerned only with the checklist component.

Following download to the desktop software, the user should delete the file from the mobile web server. Users are cautioned to be sure of successful download to the desktop prior to deleting files from the handheld.

The user should select **MOBILE WEB | RETRIEVE OBSERVATIONS FROM MOBILE WEB SERVER** to begin the retrieval process.

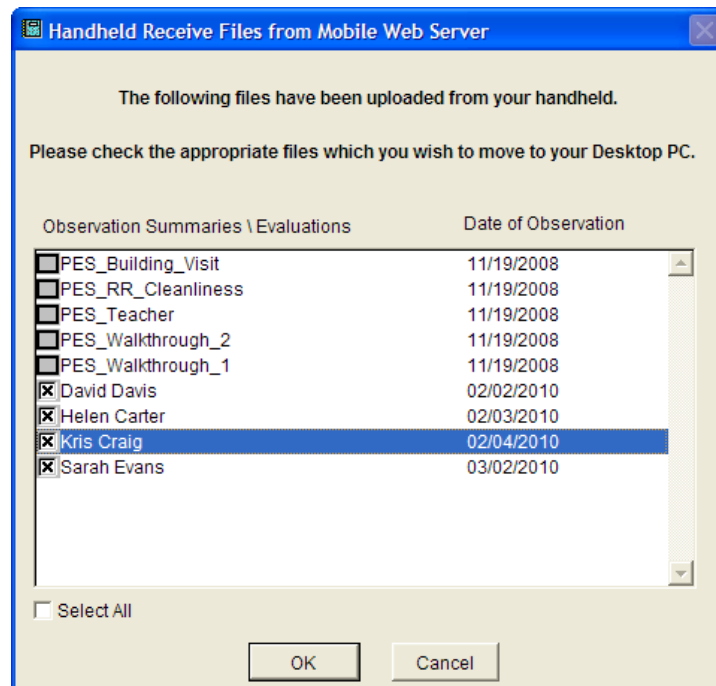


A cautionary dialogue will appear to verify that preferences on the desktop match the type of work being uploaded.



The user should click the **YES** button to begin the download.

All the observation and evaluation files from the user's Android will be retrieved to the desktop software. The following dialogue will appear.



The user will most likely wish to move only some of these files to the desktop and should click the checkbox beside the file names of those to be moved. There is certainly no reason to migrate templates to the desktop with each upload.

Especially if the upload moved more than one type of employee, the user should be careful to click the checkbox for only those files consistent with the current active preferences. Using the illustration above, one file is for a teacher while another is for a custodian. The active desktop preferences will determine which uploaded files the user should select.

Users who mistakenly mismatch files when uploading can recover by changing the desktop preferences to match the desired upload and performing the upload a second time. For example, a user who uploads a custodian evaluation when secretarial preferences are active can recover by changing the desktop preferences and uploading the custodial evaluation a second time.

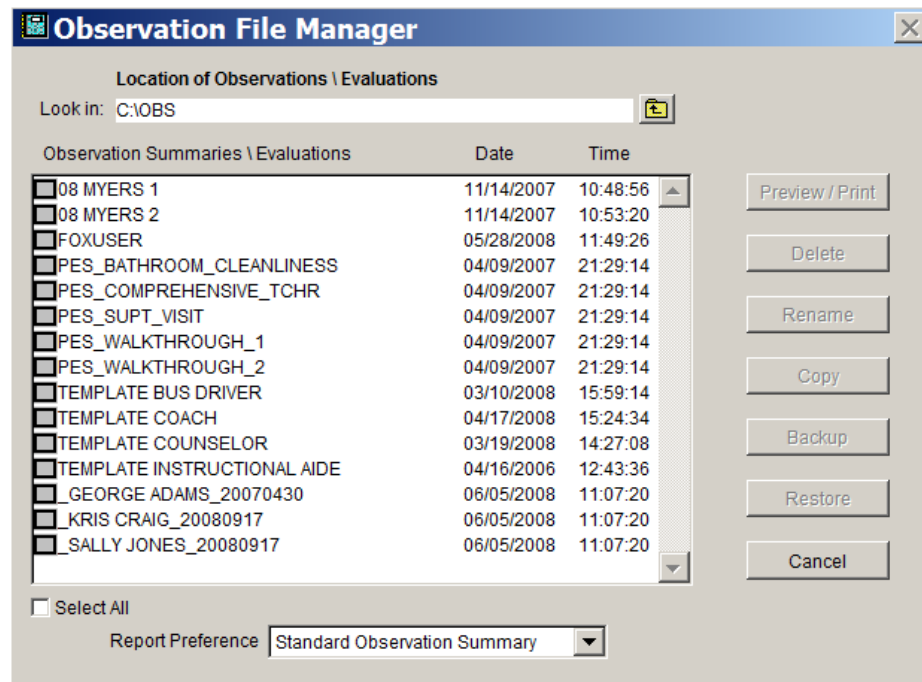
## Working with Retrieved Files

Once retrieved to the PC desktop, observations from the Android can be viewed, edited, printed, or archived like any file begun on the desktop edition of ***The Administrative Observer***.

Three steps are recommended following upload from the handheld.

- Rename the file according to the district's approved file naming protocol.
- Open the file to validate its content or edit if necessary.
- Generate a feedback report to the employee.

To rename, the user should click **FILE | OBSERVATION FILE MANAGER** to activate the Observation File Manager. The following dialogue will appear.



Uploaded files will always appear **at the bottom** of the file listing and will show the employee name followed by a series of numbers. The user should rename uploaded files according to the approved naming protocol.

As retrieved    \_GEORGE ADAMS\_20070430  
-----  
As renamed    11 Adams 1

In the example above, the renaming protocol has three parts.

|                        |   |       |                                   |
|------------------------|---|-------|-----------------------------------|
| Fiscal Year            | = | FY11  | <b><u>Resultant File Name</u></b> |
| Teacher last name      | = | Adams | 11 Adams 1                        |
| serial number of visit | = | 1     |                                   |

After renaming, the user should click **CANCEL** to exit the observation file manager.

To open the file to validate or edit its contents, the user should click **FILE | OPEN** and select the uploaded file as renamed. Review and adjust the content of the file as desired using the procedures detailed earlier in this manual. Following revision, save the edited file.

To generate feedback to the observed employee, the user should click **REPORTS | OBSERVATION REPORTS** and follow the logical prompts. The procedure for report creation is detailed in earlier parts of this manual.

### **If you encounter difficulties**

We encourage all users to explore with curiosity the menus and features found in The Administrative Observer Android Edition. We also hope they will consult the product manual and tutorial screencasts accessible from the desktop software HELP menu.

We do not, however, intend for them to be unduly frustrated or for them to endure malfunctioning software. Please contact Preferred Educational Software toll free at 888-959-2016 if you need assistance.

### **Training is available.**

Comprehensive training is available to interested users at nominal cost. Visit <http://www.42regular.com/training> for details.

## Appendix 1 – Examples of Observation Summary Documents

**The Administrative Observer** generates observation summary documents for any systematic observation. The next few pages will illustrate some of the possibilities.

| Document Illustrated                   | Style Shown             |
|--|-------------------------|
| Walkthrough Summary                    | Standard – nonrated     |
| Walkthrough Series Documentation       | Bulleted with Notes     |
| Comprehensive Classroom Observation    | Standard format – rated |
| Bathroom Cleanliness Observation       | Standard format         |
| Superintendent Building Visit Feedback | Standard format         |

All documents print in a variety of styles with no need for manual formatting! Styles include ...

- Standard format
- Walkthrough summary
- Paragraph narrative
- Bulleted checklist
- Bulleted checklist with notes
- All above on letterhead also

All documents can be expressed in the following formats with ease.

- Standard hardcopy to the printer
- Adobe PDF
- MS Word (DOC)
- MS Excel (XLS)
- HTML
- Text only

**All observation documents can be tailored or customized to reflect your own individual preferences for form and content!**

## Walkthrough Observation Summary

Teacher: Charles Abernathy

Date Observed: 10/14/2008

Subject: US History

Time: 10:15 - 10:22

Observer: Bill Craig

Students Present: 27

---

### Perceptions

I saw many good things when I visited your classroom today. My perceptions are summarized below.

Quiet, orderly classroom atmosphere.

Students appropriately engaged in meaningful activities

Meaningful recitation from all students.

Teacher skillfully guiding direct instruction.

Friendly, welcoming classroom environment.

Skillful classroom management.

Appropriate accommodations for special needs students

Comprehensive substitute teacher folder containing all needed information

### Reflections

I encourage you to reflect on the areas listed below and consider what changes, if any, might be warranted.

Classroom decor.

### Comments

Your classroom seems to be a place where children enjoy learning from a skillful teacher. My compliments. Despite your instructional strengths, I encourage you to improve your classroom decor.

## Running Record of Walkthrough Visits

**Teacher: Tom Johnson**

**Initial Visit: 11/14/2008**

**Subject: Freshman English**

**Observer: Bill Craig**

---

### **Walkthrough Visit Summary - 11/14**

I saw many good things when I visited your classroom today. Desirable teaching behaviors I observed are shown below.

- Quiet, orderly classroom atmosphere.
- Students appropriately engaged in meaningful activities.
- Meaningful recitation from all students.
- Teacher skillfully guiding direct instruction.
- Friendly, welcoming classroom environment. Appropriate classroom decor.
- Skillful questioning technique and feedback to students.
- Skillful classroom management.

No deficiencies or substandard performance observed during this visit. Keep up the good work.

### **Walkthrough Visit Summary - 12/12**

I saw many good things when I visited your classroom today. Desirable teaching behaviors I observed are shown below.

- Quiet, orderly classroom atmosphere.
- Students appropriately engaged in meaningful activities
- Meaningful recitation from all students.
- Teacher skillfully guiding direct instruction.
- Friendly, welcoming classroom environment. Appropriate classroom decor.
- Skillful questioning technique and feedback to students.
- Skillful classroom management.

I encourage you to consider resuming the use vocabulary overviews and/or concept organizers to improve the power of your lessons.

### **Walkthrough Visit Summary - 1/13**

I saw many good things when I visited your classroom today. Desirable teaching behaviors I observed are shown below.

- Quiet, orderly classroom atmosphere.
- Students appropriately engaged in meaningful activities.
- Meaningful recitation from all students.
- Skillful questioning technique and feedback to students.
- Comprehension aides - - vocabulary overviews and/or concept organizers.
- Skillful classroom management.

Instructional skills observed during this visit were strong. That being said, classroom decor needs your attention. A messy classroom does not set a good example and detracts from focused, engaged learning.

**Walkthrough Visit Summary - 2/16**

I saw many good things when I visited your classroom today. Desirable teaching behaviors I observed are shown below.

- Quiet, orderly classroom atmosphere.
- Students appropriately engaged in meaningful activities.
- Meaningful recitation from all students.
- Teacher skillfully guiding direct instruction.
- Friendly, welcoming classroom environment. Appropriate classroom decor.
- Skillful questioning technique and feedback to students.
- Comprehension aides - - vocabulary overviews and/or concept organizers.
- Skillful classroom management.

No recommendations at this time. Keep up the good work.

**Conference Summary**

Conferences were held during Mr. Johnson's conference period on the date of each walkthrough visit.

**Comments**

Your classroom seems to be a place where children enjoy learning from a skillful teacher. My compliments.

\_\_\_\_\_  
**Bill Craig**  
**Principal**

\_\_\_\_\_  
**Date**

I have discussed the information contained in this document with my principal and was given the opportunity to ask questions about its content.

\_\_\_\_\_  
**Teacher**

\_\_\_\_\_  
**Date**

## Comprehensive Classroom Observation

**Teacher: Sherry Carlson**

**Date Observed: 10/14/2008**

**Class: Reading**

**Time: 9:15 - 9:45**

**Observer: Bill Craig**

**Students present: 28**

### Preparation

Mrs. Carlson prepared a complete lesson plan focused on vocabulary development and reading comprehension prior to class. Meaningful activities from the adopted basal series were planned. The activities filled the available class time. The basal reader, the workbook, and supplemental instructional materials were used. Mrs. Carlson clearly expressed the purpose of the lesson was to learn new vocabulary and to understand the story in detail.

Quality indicators are shown below.

|                  |  |
|------------------|--|
| <b>Very Good</b> | Planned appropriate activities to fill available class time. |
| <b>Good</b>      | Prepared sufficient instructional materials.                 |
| <b>Good</b>      | Clear statement of instructional purpose.                    |
| <b>Very Good</b> | Established why lesson is important for students to learn.   |
| <b>Very Good</b> | Reviewed student work from previous period.                  |

### Components of the lesson

Mrs. Carlson skillfully included the necessary parts of a good reading lesson. The following components were clearly in evidence: introduction, clear instructional objective, substantive content, modeling of desired outcomes, check for student understanding, guided practice, independent practice, and closure.

Quality indicators are shown below.

|                  |  |
|------------------|--|
| <b>Very Good</b> | Successfully focused student attention with a good introduction.           |
| <b>Good</b>      | Clearly expressed instructional objective.                                 |
| <b>Very Good</b> | Included meaningful, substantive, and developmentally appropriate content. |
| <b>Very Good</b> | Modeling of desired outcomes.  |
| <b>Excellent</b> | Systematically checked for student understanding.                          |
| <b>Good</b>      | Provided ample time for guided practice.                                   |
| <b>Good</b>      | Provided opportunity for independent practice.                             |
| <b>Very Good</b> | Brought appropriate closure to the lesson.                                 |

### Instructional Performance

Mrs. Carlson began the class with a brief review of the sight word vocabulary from the last lesson. Introduction of the story of the followed. Mrs. Carlson established interest with a series of provocative questions. Oral reading of the story followed. Mrs. Carlson appropriately overlooked minor oral reading miscues, calling attention only to those that might affect comprehension. Students completed a reinforcing vocabulary worksheet after the story was complete. Mrs. Carlson reviewed this vocabulary worksheet prior to assigning a series of comprehension questions to be completed during quiet study time.

Quality indicators are shown below.

|                  |  |
|------------------|--|
| <b>Very Good</b> | Conveyed enthusiasm for lesson content and successfully motivated student participation. |
| <b>Very Good</b> | Demonstrated appropriate understanding of characteristics of primary grade students.     |
| <b>Good</b>      | Provided appropriate and varied instructional stimuli                                    |
| <b>Very Good</b> | Monitored active engagement of all students.   |
| <b>Very Good</b> | Varied instruction to accommodate different learning styles.                             |
| <b>Very Good</b> | Skillfully varied the pace of instruction to reach students of all ability levels.       |
| <b>Good</b>      | Made appropriate accommodations for special needs students.                              |
| <b>Good</b>      | Provided guided practice and time to work on assignments.                                |

### **Assessment and feedback to students**

Mrs. Carlson used provocative questions and intermittent student recitation to assess the extent to which students understood the lesson. Questions included literal, interpretive, and evaluative types and tended to originate with the teacher. Follow-up questions to probe student understanding and generate clarity were well done.

Quality indicators are shown below.

|                  |  |
|------------------|--|
| <b>Very Good</b> | Systematically assessed understanding of all students in the class.            |
| <b>Excellent</b> | Required meaningful recitation from all students.                              |
| <b>Good</b>      | Followed incorrect answers with probing questions for clarity.                 |
| <b>Very Good</b> | Required production from all students.   |
| <b>Good</b>      | Effectively used wait time following questions to increase student engagement. |
| <b>Good</b>      | Provided timely and constructive feedback to students.                         |
| <b>Very Good</b> | Encouraged student self-evaluation.  |

### **Classroom Management**

Students were well behaved under Mrs. Carlson's direction. A genuine caring relationship with the students was evident. Mrs. Carlson's movement to all areas of the room during instruction helped maintain instructional focus and appropriate student behavior.

Quality indicators are shown below.

|                  |   |
|------------------|---|
| <b>Excellent</b> | Arranged and decorated the classroom to enhance learning.               |
| <b>Excellent</b> | Routinely called students by name throughout the lesson.                |
| <b>Good</b>      | Demonstrated empathetic understanding of student questions.             |
| <b>Very Good</b> | Maintained high level of on-task behaviors throughout the class period. |
| <b>Good</b>      | Made good use of non-verbal cues.                                       |
| <b>Good</b>      | Overlooked minor infractions appropriately.                             |
| <b>Very Good</b> | Made good use of classroom aide and parent volunteers.                  |

### **Commendations**

Mrs. Carlson was well prepared for this class and kept students on task appropriately. A genuine caring relationship with the students was evident. Students were focused and engaged throughout the period.

### **Recommendations**

1. The power of your questions may be increased by asking students to explain why an answer is right or wrong.
2. You may also want to consider establishing and charting production goals for students in your class to improve engagement.

---

**Bill Craig**  
**Principal**

---

**Date**

I have discussed this information with my principal and was given the opportunity to ask questions about its content.

---

**Teacher**

---

**Date**

**Bathroom Cleanliness Check****Custodian: Ronald Clark****Date Observed: 10/14/2008****School Site: Washington School****Time: 6:15 AM****Observer: Bill Craig**

---

**Perceptions**

First floor bathrooms 101 and 102 were observed systematically today. Custodial performance in each area listed below was satisfactory or better.

Toilets appropriately cleaned and free of odor, bodily residues, and stains.

Urinals appropriately cleaned and free of odor, bodily residues, and stains.

Floor mopped and cleaned with particular attention to crevices and baseboards.

Lavatories cleaned and free of stains, residues, and spotting.

Wastebaskets emptied and fresh liners inserted.

All classroom supplies restocked including wastebasket liner, handtowels, and chalk.

Clogged, malfunctioning, or broken fixtures repaired and reported to site principal or designee.

Graffiti or vandalism reported promptly to site principal or designee.

**Reflections**

Substandard cleanliness was observed in each area listed below. I encourage you to reflect on each item listed and consider what changes, if any, might be warranted.

Mirrors must be cleaned, polished, and free of streaks.

**Comments**

Please see me if you have any questions about areas of deficiency noted above.

## Superintendent's Visit Summary

**Principal: Steven Garcia**

**Date Observed: 10/14/2008**

**Building: Washington School**

**Time: 11:15 - 11:35**

**Observer: Bill Craig**

---

### **Impressions**

I saw many good things when I visited your school today. My perceptions are summarized below.

Building has friendly and welcoming atmosphere.  
Hallways appear to be quiet and orderly.  
Helpful and friendly staff assists visitors.  
Offices, hallways, and classrooms are clean and inviting.  
School routines give the impression of smooth-running efficiency  
Students appear to be engaged appropriately.  
District protocols for safety and security appear to be followed.

### **Recommendations**

I encourage you to reflect on the areas listed below and consider what changes, if any, might be warranted.

No recommendations at this time.  
Keep up the good work!

### **Comments**

It is a pleasure to visit a well run school where students seem to be the focus and where learning is obviously underway. My compliments.

## Appendix 2 – Examples of Evaluation Documents

**The Administrative Observer** can generate evaluation documents for any job category. The next few pages will illustrate some of the possibilities.

| Evaluation Document Illustrated | Style Shown                 |
|---------------------------------|-----------------------------|
| Coach                           | Standard format – rated     |
| Instructional Aide              | Bulleted List – rated       |
| Custodian                       | Standard format – rated     |
| Secretary                       | Paragraph format – nonrated |
| Counselor                       | Standard format – rated     |

All documents can print in a variety of styles with no need for manual formatting! Styles include ...

- Standard format
- Walkthrough summary
- Paragraph narrative
- Bulleted checklist
- Bulleted checklist with notes
- All above on letterhead also

All documents can be expressed in the following formats with ease.

- Standard hardcopy to the printer
- Adobe PDF
- MS Word (DOC)
- MS Excel (XLS)
- HTML
- Text only

**All evaluation documents can be adjusted easily to reflect the appropriate position description and your own individual preferences for form and content!**

## Head Coach Evaluation

**Coach: William Brown**

**Date: 10/14/2008**

**Activity: Football**

**Season: Fall**

**Evaluator: Bill Craig**

**Number of Participants: 132**

### Pre-Season Prep

Coach Brown prepared a complete and thorough plan for the season prior to its beginning. In addition to off-season camps, meaningful activities for recruitment, skills development, strength and endurance training, and injury prevention were evident in the pre-season. Coach Brown also conducted scouting activities and used that information to develop tactical strategies for each contest.

|                  |  |
|------------------|--|
| <b>Good</b>      | Conducted appropriate off-season camps to develop participant interest and skills.                 |
| <b>Good</b>      | Planned and completed appropriate recruiting activities to maximize student involvement.           |
| <b>Very Good</b> | Planned and conducted developmentally appropriate pre-season practices.                            |
| <b>Good</b>      | Conducted a systematic program of strength training for all participants.                          |
| <b>Fair</b>      | Initiated a program to prevent, minimize, and treat predictable injuries related to this activity. |
| <b>Excellent</b> | Coordinated an effective scouting program.   |
| <b>Very Good</b> | Developed appropriate tactical strategies for each contest.  |
| <b>Fair</b>      | Scheduled appropriately challenging contests with non-conference opponents.                        |

### Program Development

Coach Brown skillfully addressed the necessary areas important to building a quality program. The following components were clearly in evidence: feeder program, participant recruitment, goal setting, effective scouting, strength and endurance training, skills development, team building, and team celebration of goal attainment.

|                  |  |
|------------------|--|
| <b>Good</b>      | Developed interest in younger students through feeder program initiatives.                         |
| <b>Good</b>      | Increased number of participants through effective recruiting.                                     |
| <b>Good</b>      | Gathered relevant information about opponents with comprehensive scouting activities.              |
| <b>Good</b>      | Required developmentally appropriate activities to develop strength and endurance in participants. |
| <b>Very Good</b> | Conducted practices clearly designed for incremental skills development.                           |
| <b>Excellent</b> | Conducted activities to build individual participants into a cohesive team.                        |
| <b>Very Good</b> | Conducted appropriate mid-season and post-season celebrations.                                     |

### Coaching Performance

Coach Brown demonstrated a clear understanding of his role as a coach. The developmental needs of participants were effectively balanced with the goal of winning contests. Practices were conducted systematically to develop the skills and attitudes needed by a winning team. Playing time was allotted to all players on the basis of their contribution to winning contests. Coach Brown was firm and fair with all participants during practices and was an excellent role model following all contests whether they ended in victory or defeat.

|                  |  |
|------------------|--|
| <b>Good</b>      | Involved all participants in appropriate team goal setting for the season.         |
| <b>Excellent</b> | Clearly established the roles of all assistant coaches                             |
| <b>Good</b>      | Conducted effective practices to develop strength, endurance, and athletic skills. |
| <b>Fair</b>      | Provided appropriate, systematic feedback to all participants.                     |
| <b>Very Good</b> | Effectively applied participant skills and contest tactics to defeat opponents.    |
| <b>Good</b>      | Encouraged participant self-evaluation and individual goal setting.                |

**Program Management**

Coach Brown successfully coordinated all aspects of a quality program. Skillful use of the booster club resulted in an effective partnership with parents that raised needed monies for equipment. Incentives for the assistant coaches, trainer, and scouts helped build loyalty to the program. Officials and visiting coaches commented on Coach Brown's attention to their hospitality needs while at our school.

- Very Good**      Oversaw the acquisition, maintenance, and repair of necessary equipment.
- Very Good**      Worked effectively with the booster club to raise needed funds.
- Excellent**      Successfully motivated and used the talents of assistant coaches assigned to the program.
- Good**            Demonstrated appropriate concern for visiting teams and officials.
- Fair**             Skillfully used the trainer to prevent, minimize, and treat predictable injuries.
- Good**            Maintained good relationship with coaches of feeder levels.

**Post-Season Wrap-up**

Coach Brown took great care to recognize the individual contributions of participants to the success of the team. The mutual respect between coach and players was evident at the post-season banquet. Coach Brown took time at that event to recognize each participant.

- Very Good**      Recognized the contribution of each participant to the success of the program.
- Good**            Completed all required reports and requisitions.

**Commendations**

Coach Brown was well prepared for this season and made it a success for the team. Particularly worthy of note are Coach Brown's organizational skills and knowledge of the developmental characteristics of participants. Coach Brown seemed to have a genuine caring relationship with each member of the team.

**Recommendations**

1. Consider increasing your use of the trainer to prevent and minimize predictable injuries.
2. You may also want to consider charting the attainment of personal fitness goals for participants to improve engagement during pre-season training.

\_\_\_\_\_  
**Bill Craig**  
**Athletic Director**

\_\_\_\_\_  
**Date**

I have discussed the information contained in this document with my athletic director and was given the opportunity to ask questions about its content.

\_\_\_\_\_  
**Coach**

\_\_\_\_\_  
**Date**

## Instructional Aide Evaluation

**Instructional Aide: Bridget Abernathy**

**Conference Date: 10/14/2008**

**Evaluation Period: FY09**

**Evaluator: Bill Craig**

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### Preparation and Training

|                  |  |
|------------------|--|
| <b>Excellent</b> | Demonstrates appropriate skill in the use of classroom and clerical equipment.                   |
| <b>Very Good</b> | Consistently follows standard classroom practices.   |
| <b>Very Good</b> | Demonstrates appropriate skill and good judgement in following district policies and procedures. |
| <b>Good</b>      | Attends required training and integrates new procedures into daily routine as directed.          |
| <b>Good</b>      | Seeks help and asks questions appropriately when confronted with novel situations.               |

### Performance Assisting Students

|                  |   |
|------------------|---|
| <b>Very Good</b> | Demonstrates an appropriate, empathetic understanding of the students.                |
| <b>Very Good</b> | Demonstrates skills needed for successful one-to-one tutoring.                        |
| <b>Good</b>      | Requires student effort before providing assistance with assigned work.               |
| <b>Good</b>      | Successfully guides small groups to completion of assigned work within allotted time. |

### Performance Assisting Teachers

|                  |   |
|------------------|---|
| <b>Good</b>      | Demonstrates clear understanding of role expectations for instructional aides.              |
| <b>Good</b>      | Exercises initiative when appropriate.  |
| <b>Fair</b>      | Understands which matters must be deferred to classroom teacher or administrative staff.    |
| <b>Very Good</b> | Completes appropriate amount of work in the allotted time.                                  |
| <b>Very Good</b> | Quality of completed work is high.  |
| <b>Excellent</b> | Routinely holds in confidence all information related to students and classroom operations. |
| <b>Good</b>      | Handles non-routine situations appropriately while completing assigned daily tasks.         |
| <b>Good</b>      | Works well with minimal supervision once instructions are given.                            |

### Supervision of Students

|                  |   |
|------------------|---|
| <b>Very Good</b> | Demonstrates good supervisory judgement in a variety of settings. |
| <b>Very Good</b> | Enforces school expectations evenhandedly with students.          |
| <b>Good</b>      | Is attentive and alert to the activities of students.             |
| <b>Excellent</b> | Consistently demonstrates a concern for student safety.           |

### Essential Behaviors

|                  |   |
|------------------|---|
| <b>Good</b>      | Demonstrates dependability.   |
| <b>Good</b>      | Demonstrates reliable consistency in the performance of assigned duties.      |
| <b>Fair</b>      | Is consistently punctual for assigned duty shifts.                            |
| <b>Very Good</b> | Maintains solid record of attendance with absences only for approved reasons. |
| <b>Very Good</b> | Maintains good working relationship with other employees.                     |
| <b>Excellent</b> | Demonstrates appropriate relationship with students.                          |
| <b>Excellent</b> | Demonstrates appropriately helpful relationship with visitors to the school.  |

**Commendations**

Mrs. Abernathy has taken work seriously during this evaluation period. Attentive during training sessions, Mrs. Abernathy has integrated concepts taught into the daily operational routine. Mrs. Abernathy provides significant assistance to the students and teachers of this school.

**Recommendations**

1. You are generally punctual, but late for work more often than most. Work to improve your on-time arrival during the next evaluation period.
2. You demonstrate understanding of the supportive role generally, but sometimes take initiative that belongs to teachers. Consult with your assigned teachers before undertaking non-routine tasks.
3. You have many good ideas. Consider contributing to the employee suggestion program to improve daily efficiencies.

\_\_\_\_\_  
**Bill Craig**  
**Principal**

\_\_\_\_\_  
**Date**

I have discussed the information contained in this document with my supervisor and was given the opportunity to ask questions about its content.

\_\_\_\_\_  
**Instructional Aide**

\_\_\_\_\_  
**Date**

## Custodian Evaluation

**Custodian: Paul Jackson**

**Date: 10/14/2008**

**Evaluation Period: FY09**

**Evaluator: Bill Craig**

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### Preparation and Training

Mr. Jackson consistently demonstrates appropriate foundation skills. Standard operating procedures and cleaning guidelines are followed routinely. When new machinery, chemicals, or processes are added to the expectations for custodians, Mr. Jackson attends the appropriate training sessions and integrates the concepts learned into the daily operational routine as directed. When novel situations emerge, Mr. Jackson sometimes tries to be too helpful when it would be better to seek help or clarification.

#### Performance Indicators

|                  |   |
|------------------|---|
| <b>Very Good</b> | Demonstrated appropriate skill in the use of custodial machinery and equipment.               |
| <b>Good</b>      | Demonstrated appropriate skill in the use of custodial chemicals.                             |
| <b>Good</b>      | Demonstrated appropriate skill and good judgement in following district custodial guidelines. |
| <b>Good</b>      | Attended required training and integrated new procedures into daily routine as directed.      |
| <b>Fair</b>      | Sought help and asked questions appropriately when confronted with novel situations.          |

### Daily Performance

Mr. Jackson demonstrates a clear understanding of the work that must be performed on each duty shift. An appropriate quantity of work is normally completed in the allotted time, and the quality of that work is typically good. Mr. Jackson works well with minimal supervision once directions have been given and typically demonstrates appropriate flexibility to accommodate non-routine situations that emerge during the duty shift while completing assigned daily tasks.

#### Performance Indicators

|                  |   |
|------------------|---|
| <b>Good</b>      | Completes an appropriate amount of work in the allotted time.                       |
| <b>Good</b>      | Quality of completed work is high.  |
| <b>Very Good</b> | Works well with minimal supervision once instructions are given.                    |
| <b>Fair</b>      | Handles non-routine situations appropriately while completing assigned daily tasks. |

### Workspace Management

Mr. Jackson consistently demonstrates good workplace awareness and technique. All safety protocols for the operation of machinery and the proper use of chemicals are followed routinely. Mr. Jackson generally manages time well and prioritizes tasks consistent with district expectations. Excessive or inappropriate absences have not been a problem.

#### Performance Indicators

|             |   |
|-------------|---|
| <b>Good</b> | Observes established safety protocols when using custodial machinery and equipment. |
| <b>Good</b> | Observes established safety protocols when using custodial chemicals.               |
| <b>Good</b> | Manages time well to complete assigned tasks as scheduled.                          |
| <b>Good</b> | Prioritizes non-routine tasks for completion consistent with district expectations. |

**Essential Behaviors**

Mr. Jackson has been dependable and reliable in the performance of assigned duties. Consistently punctual, Mr. Jackson has maintained a good record of attendance and has earned a reputation as a good worker who perseveres to complete assigned tasks. Mr. Jackson appears to have a good working relationship with other employees, our students, and the public that visits our school.

Performance Indicators

- Good**                 Demonstrates dependability.
- Very Good**         Demonstrates reliable consistency in the performance of assigned duties.
- Good**                 Is consistently punctual for assigned duty shifts.
- Good**                 Maintains solid record of attendance with absences only for approved reasons.
- Good**                 Maintains good working relationship with other employees.
- Very Good**         Demonstrates appropriate relationship with students.
- Good**                 Demonstrates appropriately helpful relationship with visitors to the school.

**Commendations**

Mr. Jackson has taken work seriously during this evaluation period. Attentive during training sessions, Mr. Jackson has integrated concepts taught into the daily operational routine. Mr. Jackson has been an important member of the custodial team that maintains this school.

**Recommendations**

1. You have many good ideas. Consider contributing to the employee suggestion program to improve daily efficiencies.

\_\_\_\_\_  
**Bill Craig**  
**Principal**

\_\_\_\_\_  
**Date**

I have discussed the information contained in this document with my supervisor and was given the opportunity to ask questions about its content.

\_\_\_\_\_  
**Custodian**

\_\_\_\_\_  
**Date**

## Office Staff Evaluation

**Employee: Sarah Johnson**

**Conference Date: 10/14/2008**

**Evaluation Period: FY09**

**Evaluator: Bill Craig**

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### **Preparation and Training**

Mrs. Johnson consistently demonstrates appropriate foundation skills for a smoothly functioning office. Standard operating procedures are followed routinely. When new equipment, policies, or procedures are added to the expectations for the office staff, Mrs. Johnson attends the appropriate training sessions and integrates the concepts learned into the daily operational routine as directed. When novel situations emerge, Mrs. Johnson had demonstrated good judgement in seeking help or clarification.

### **Daily Performance**

Mrs. Johnson demonstrates a clear understanding of the work that must be performed on each duty shift. An appropriate quantity of work is normally completed in the allotted time, and the quality of that work is typically good. Mrs. Johnson serves as a pleasant point of first contact for school visitors and works well with minimal direct supervision. When confronted with unusual situations, Mrs. Johnson typically uses good judgement in deciding which merit an immediate action or answer and which must be deferred to the administrative staff.

### **Workspace Management**

Mrs. Johnson consistently demonstrates good workplace awareness and technique. In all dealings with students and staff, Mrs. Johnson uses good judgement and observes the approved protocols for safety and confidentiality. Mrs. Johnson generally manages time well and prioritizes tasks consistent with district expectations. Excessive or inappropriate absences have not been a problem.

### **Essential Behaviors**

Mrs. Johnson has been dependable and reliable in the performance of assigned duties. Consistently punctual, Mrs. Johnson has maintained a good record of attendance and has earned a reputation as a good worker who perseveres to complete assigned tasks. Mrs. Johnson appears to have a good working relationship with other employees, our students, and the public that visits our school.

### **Commendations**

Mrs. Johnson has taken work seriously during this evaluation period. Attentive during training sessions, Mrs. Johnson has integrated concepts taught into the daily operational routine. Mrs. Johnson has been an important member of the office staff for this school.

### **Recommendations**

You have many good ideas. Consider contributing to the employee suggestion program to improve daily efficiencies.

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**Bill Craig**  
**Principal**

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**Date**

I have discussed the information contained in this document with my supervisor and was given the opportunity to ask questions about its content.

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**Employee**

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**Date**

## Counselor Evaluation Summary

**Counselor: Dorothy Green**

**Review Date: 10/14/2008**

**School: Washington High School**

**Observer: Bill Craig**

### Counseling Initiative

Consistent with district expectations, the majority of Mrs. Green's time as counselor is devoted to assisting students, teachers, and parents. Most often this takes the form of individual or small group conferences and group outreach. Emphasis is placed on matching student interests and abilities with their course of study and future goals. Mrs. Green consistently demonstrates a strong understanding of developmental psychology appropriate to students at this site and does a good job applying this knowledge to all aspects of guidance and counseling. Data describing student interests and abilities is used well to optimize student placement and programming.

|                  |   |
|------------------|---|
| <b>Good</b>      | Prioritizes available time to assist students, teachers, and parents as needed.                       |
| <b>Very Good</b> | Conducts individual and small group sessions to address and resolve student concerns.                 |
| <b>Good</b>      | Conducts outreach activities to convey information about current choices and post-secondary planning. |
| <b>Excellent</b> | Maintains appropriate professional distance in all relationships with students.                       |
| <b>Good</b>      | Observes client confidentiality, but informs administration on all matters regarding health & safety. |
| <b>Good</b>      | Demonstrates good judgment referring matters to agencies outside the school.                          |

### Performance Assisting Students

Mrs. Green consistently demonstrates a sincere, empathetic attention to student interests and abilities. This results in focused advocacy for all levels of students in the areas of interpersonal concerns, elective course selection, and post-secondary pursuits. Maintaining appropriate professional distance, Mrs. Green skillfully engages individuals and small groups in the resolution of their concerns, but shows good judgment in making referrals to outside agencies for issues requiring extensive or clinical social work. With regard to elective course selection, Mrs. Green guides students to the course of study most appropriate to their post-secondary goals.

|                  |  |
|------------------|--|
| <b>Good</b>      | Demonstrates advocacy for special needs, regular division, and academically talented students.     |
| <b>Good</b>      | Skillfully guides students in the resolution of their interpersonal concerns.                      |
| <b>Very Good</b> | Provides students solid information and guides their decisions in matters of health and safety.    |
| <b>Good</b>      | Displays good judgment in making referrals in matters requiring extensive or clinical social work. |
| <b>Good</b>      | Provides solid information to students regarding post-secondary possibilities.                     |
| <b>Good</b>      | Displays sincere, empathetic attention to matters of student concern.                              |

### Performance Assisting Teachers

Mrs. Green uses knowledge of developmental psychology in general and information about particular individuals to support the instructional efforts of teachers. Mrs. Green demonstrates appropriate respect for student privacy or confidentiality and encourages direct conversation with students in those instances. As a member of multidisciplinary teams, Mrs. Green provides significant insight to the development of individual educational plans.

|                  |   |
|------------------|---|
| <b>Good</b>      | Remains current with the professional literature on developmental psychology appropriate to this site.      |
| <b>Good</b>      | Collects and applies information about student interests, abilities, and situations to support instruction. |
| <b>Very Good</b> | Demonstrates appropriate respect for student privacy or confidentiality.                                    |
| <b>Good</b>      | Participates meaningfully on multidisciplinary teams to create individual educational plans.                |
| <b>Good</b>      | Assists as requested with interventions to assist struggling students.                                      |

**Performance Assisting Parents**

In response to individual requests and through outreach activities, Mrs. Green aides parents with information regarding current campus life, important near-term decisions, and post-secondary choices. Emphasizing that "all students will someday have a job," Mrs. Green focuses on the preparatory steps to those jobs whether immediate post-secondary employment or post-collegiate in nature.

- Good** Provides information to parents regarding important events and decisions to be made.
- Good** Involves parents in decisions regarding elective choices and the development of a course of study.
- Very Good** Assists parents with information about the application process for post-secondary education.
- Good** Assists parents with information about immediate post-secondary employment.
- Good** Assists parents with information about financial resources to assist with post-secondary pursuits.
- Fair** Informs parents on all matters pertaining to the health or safety of their student.

**Essential Behaviors**

Students and faculty see Mrs. Green fair and consistent. The office projects a neat, orderly appearance that suggests attentiveness to detail. While keeping an eye on the "big picture" and district priorities, Mrs. Green seems to treat student, faculty, and parent concerns as important and aides in the resolution of those concerns. Consistently requesting input and recommendations from students and faculty, Mrs. Green is routinely described as "encouraging" and "a good listener."

- Good** Presents a neat, orderly appearance personally and throughout the office.
- Very Good** Is fair and consistent in dealings with students, parents, and the faculty.
- Good** Demonstrates role appropriate relationship with students.

**Commendations**

Mrs. Green demonstrates good judgment keeping the administration informed and requesting administrative support.

**Recommendations**

I encourage you to inform parents on all matters pertaining to the health or safety of their student. This can be done without violating the confidentiality of your relationship with students.

\_\_\_\_\_  
**Bill Craig**  
**Principal**

\_\_\_\_\_  
**Date**

I have discussed the information contained in this document with my principal and was given the opportunity to ask questions about its content.

\_\_\_\_\_  
**Counselor**

\_\_\_\_\_  
**Date**

### Appendix 3 – Examples of Supportive Documents

**The Administrative Observer** can generate documents to support the observation or evaluation process. The next few pages will illustrate some of the possibilities.

|                                 |
|---------------------------------|
| Supportive Document Illustrated |
| Pre-Observation Guide           |
| Observers Checklist             |

All supportive documents can be expressed in the following formats with ease.

- Standard hardcopy to the printer
- Adobe PDF
- MS Word (DOC)
- MS Excel (XLS)
- HTML
- Text only

**All supportive documents can be adjusted easily to reflect the appropriate position description and your own individual preferences for form and content!**

# Pre-Observation / Evaluation Guide Washington School

Teacher: \_\_\_\_\_

Your observation / evaluation is scheduled for: \_\_\_\_\_

The categories and quality indicators listed in this guide illustrate some of the performance qualities that may be considered when conducting your observation / evaluation.

## **Preparation**

- Planned appropriate activities to fill available class time.
- Prepared sufficient instructional materials.
- Clear statement of instructional purpose.
- Established why lesson is important for students to learn.
- Reviewed student work from previous period.

## **Components of the lesson**

- Successfully focused student attention with a good introduction.
- Clearly expressed instructional objective.
- Included meaningful, substantive, and developmentally appropriate content.
- Modeling of desired outcomes.
- Systematically checked for student understanding.
- Provided ample time for guided practice.
- Provided opportunity for independent practice.
- Brought appropriate closure to the lesson.

## **Instructional Performance**

- Conveyed enthusiasm for lesson content.
- Successfully motivated student participation.
- Provided appropriate and varied instructional stimuli
- Monitored active engagement of all students.
- Made effective use of current technology to enhance learning.
- Varied instruction to accommodate different learning styles.
- Skillfully varied the pace of instruction to reach students of all ability levels.
- Effectively incorporated manipulatives and hands-on materials.
- Made appropriate accommodations for special needs students.
- Provided guided practice and time to work on assignments.

## **Assessment and feedback to students**

- Systematically assessed understanding of all students in the class.
- Required meaningful recitation from all students.
- Followed incorrect answers with probing questions for clarity.
- Required production from all students.
- Effectively used wait time following questions to increase student engagement.
- Provided timely and constructive feedback to students.
- Encouraged student self-evaluation.

## **Classroom Management**

Arranged and decorated the classroom to enhance learning.  
Routinely called students by name throughout the lesson.  
Demonstrated empathetic understanding of student questions.  
Systematically monitored student work to ensure engagement.  
Clearly expressed and applied behavior expectations.  
Maintained high level of on-task behaviors throughout the class period.  
Made good use of non-verbal cues.  
Overlooked minor infractions appropriately.  
Consistently applied school rules in a firm, fair manner.

See Bill Craig if you have questions about the meaning of the categories or the quality indicators shown in this guide.

# Observation / Evaluation Checklist Washington School

Teacher:

Date Observed: 11/14/2008

Class:

Time:

Observer: Bill Craig

Students present:

## Preparation

- \_\_\_\_\_ Planned appropriate activities to fill available class time.
- \_\_\_\_\_ Prepared sufficient instructional materials.
- \_\_\_\_\_ Clear statement of instructional purpose.
- \_\_\_\_\_ Established why lesson is important for students to learn.
- \_\_\_\_\_ Reviewed student work from previous period.

Notes:

### Rating Scale

Blank = Not Observed

✓ = Observed

F = Fair

G = Good

V = Very Good

E = Excellent

## Components of the lesson

- \_\_\_\_\_ Successfully focused student attention with a good introduction.
- \_\_\_\_\_ Clearly expressed instructional objective.
- \_\_\_\_\_ Included meaningful, substantive, and developmentally appropriate content.
- \_\_\_\_\_ Modeling of desired outcomes.
- \_\_\_\_\_ Systematically checked for student understanding.
- \_\_\_\_\_ Provided ample time for guided practice.
- \_\_\_\_\_ Provided opportunity for independent practice.
- \_\_\_\_\_ Brought appropriate closure to the lesson.

Notes:

## Instructional Performance

- \_\_\_\_\_ Conveyed enthusiasm for lesson content.
- \_\_\_\_\_ Successfully motivated student participation.
- \_\_\_\_\_ Provided appropriate and varied instructional stimuli
- \_\_\_\_\_ Monitored active engagement of all students.
- \_\_\_\_\_ Made effective use of current technology to enhance learning.
- \_\_\_\_\_ Varied instruction to accommodate different learning styles.
- \_\_\_\_\_ Skillfully varied the pace of instruction to reach students of all ability levels.
- \_\_\_\_\_ Effectively incorporated manipulatives and hands-on materials.
- \_\_\_\_\_ Made appropriate accommodations for special needs students.
- \_\_\_\_\_ Provided guided practice and time to work on assignments.

Notes:

### **Assessment and feedback to students**

- \_\_\_\_\_ Systematically assessed understanding of all students in the class.
- \_\_\_\_\_ Required meaningful recitation from all students.
- \_\_\_\_\_ Followed incorrect answers with probing questions for clarity.
- \_\_\_\_\_ Required production from all students.
- \_\_\_\_\_ Effectively used wait time following questions to increase student engagement.
- \_\_\_\_\_ Provided timely and constructive feedback to students.
- \_\_\_\_\_ Encouraged student self-evaluation.

Notes:

### **Classroom Management**

- \_\_\_\_\_ Arranged and decorated the classroom to enhance learning.
- \_\_\_\_\_ Routinely called students by name throughout the lesson.
- \_\_\_\_\_ Demonstrated empathetic understanding of student questions.
- \_\_\_\_\_ Systematically monitored student work to ensure engagement.
- \_\_\_\_\_ Clearly expressed and applied behavior expectations.
- \_\_\_\_\_ Maintained high level of on-task behaviors throughout the class period.
- \_\_\_\_\_ Made good use of non-verbal cues.
- \_\_\_\_\_ Overlooked minor infractions appropriately.
- \_\_\_\_\_ Consistently applied school rules in a firm, fair manner.

Notes:

### **Commendations**

### **Recommendations**