Derventio Education Training

Course 3: Administrator tasks

Version Number: 08.15.00.00

Release Date: 4th September 2017

This course covers the areas of the iP system which have not been covered in courses one and two. The functionality covered in this course would normally only be available to a person with Administrator user rights. This training session is scheduled to two hours.

Contents Page

1 Adding and updating staff

We start this course by looking at staff member details, from adding new staff to removing old staff and including all the various settings needed to allow your staff to use the iP system effectively and efficiently.

Updating your staff details depends if you are using the iP system as a 'standalone' system or, alternatively, your iP system is connected to Active Directory or is connected to an MIS (or both).

If you are using a standalone system, go to page 6.

If your establishment does not have an MIS but does use Active Directory, go to page 5.

If you are already connected up to an MIS or are planning to do so, go now to the Help page to locate specific help documents for the following MIS systems: Arbor, Bromcom, Capita SIMS, Facility Advanced Learning, ISAMS, PupilAsset, RM Integris and Scholarpack.

Practical task
1. From the left-hand contents menu, click the down arrow next to the **Help** button 2. Select **Support Centre** 3. Locate the **MIS and Active Director Guides** section 4. Open and read any of the 14 guides which apply to your system

If you are connected to an MIS then new staff are added and updates to various details of existing staff are done automatically when you select the sync Data button.

Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Management** area 3. From the What Next? button click **Sync Data**

It is import you know which staff member fields are automatically updated from your MIS system as if you or your colleagues update these fields directly in the iP system, then there is a danger your updates will get overwritten when you next perform a data sync.

The help document for your MIS system should list those fields which are updated when you sync the iP system with your MIS.

The next item covered is adding new staff. As your new staff are imported from your MIS, you will not add new staff manually so you should now go to page 9, unless your establishment has Active Directory in which case carry on to page 5.

If your establishment does not use Active Directory miss out this page and go to page 6.

If your establishment uses Active Directory then new staff will be added automatically when they first login to the iP system using their Active Directory login credentials.

If your establishment has Active Directory but this has not yet been connected to your iP system you need to refer to the ADFS Configuration user guide.

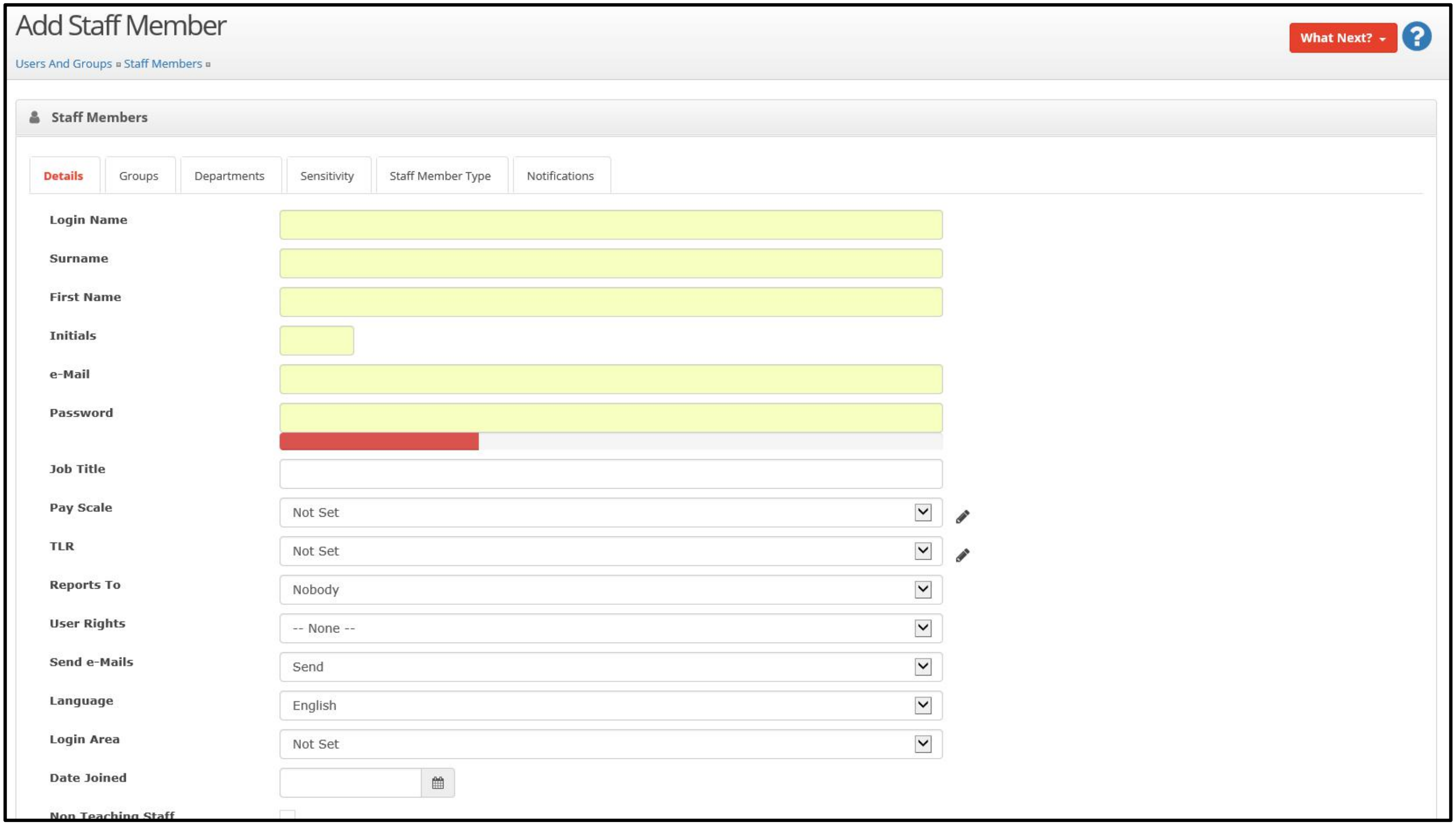
Practical task
1. From the left-hand contents menu, click the down arrow next to the **Help** button 2. Select **Support Centre** 3. Locate the **MIS and Active Director Guides** section 4. Open and read the **ADFS Configuration** user guide

The next item covered is adding new staff. As your new staff are created automatically when the staff member first logs in, you will not add new staff manually so you should now go to page 9.

You add new staff from the Staff Members page.

Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Members** area 3. From the What Next? button select **Add**

The top of the Add Staff Member screen which appears should look similar to this:



Add Staff Member
Users And Groups » Staff Members »
What Next?
Staff Members
Details
Groups
Departments
Sensitivity
Staff Member Type
Notifications
Login Name
Surname
First Name
Initials
e-Mail
Password
Job Title
Pay Scale
Not Set
TLR
Not Set
Reports To
Nobody
User Rights
-- None --
Send e-Mails
Send
Language
English
Login Area
Not Set
Date Joined
Non Teaching Staff

Notice:

- Mandatory fields are shown in yellow. You must fill these in before you can save your new addition
- There are eight tabs for you to enter staff details but the data need not be all entered straight away - only the first six fields on the Details page (the six mandatory fields) need entering immediately
- Many establishments use the staff member's email address as the login name as this is both easy to remember and is unique to the person
- The password you enter can be weak as when the staff member first logs in they are prompted to change it anyway
- The staff initials need to be unique so you may have to use more than two characters

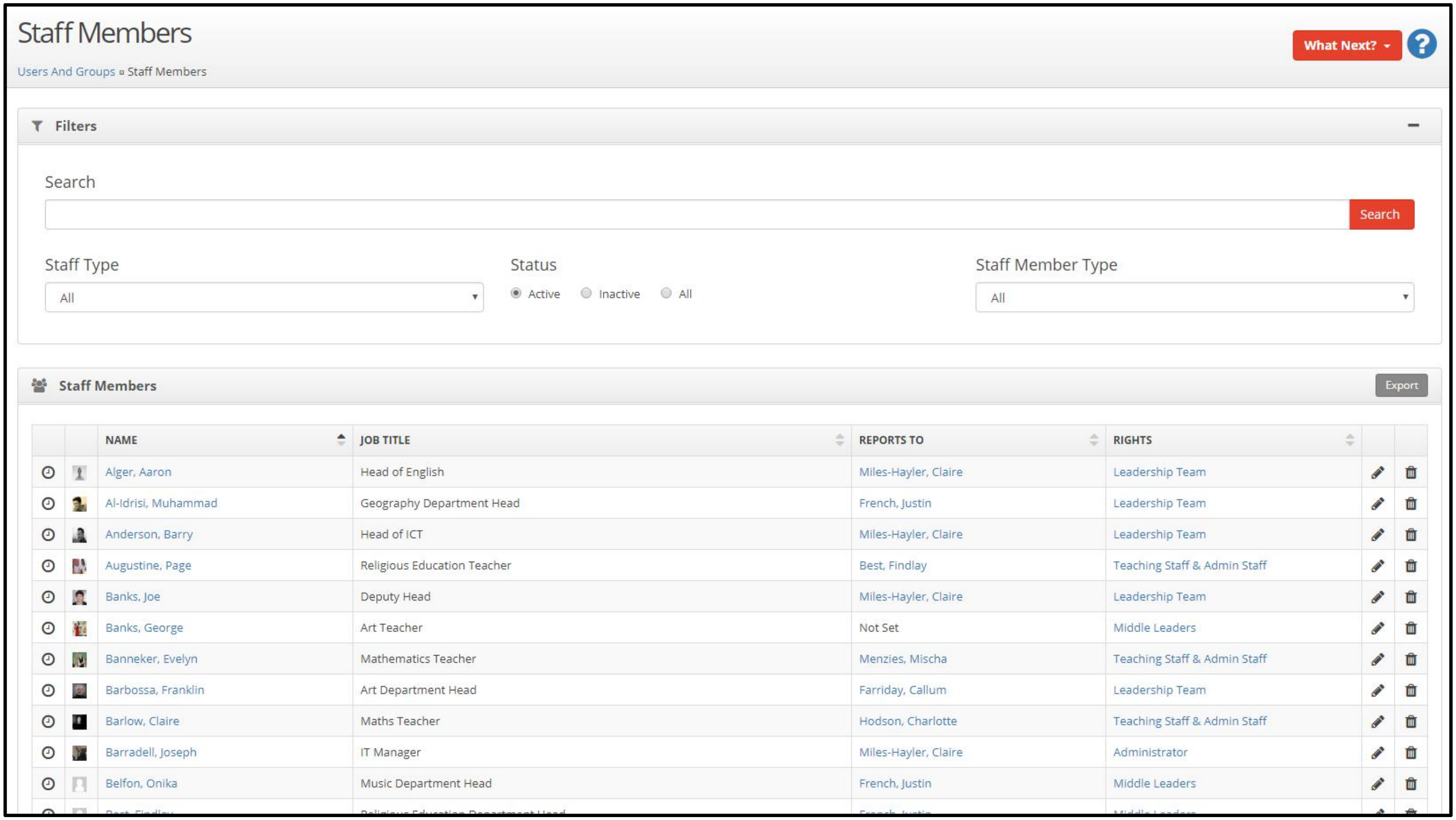
Practical task
1. Enter realistic data in the six mandatory fields 2. From the What Next? Dropdown select **Save** 3. You are returned to the staff member page where your new member of staff should be listed 4. Search for your new member of staff

Notice your new staff member lacks a job title, does not report to anybody and is not set to a User Rights Group.

Updating staff details is usually done from the Staff Members page, but some updates can be done more quickly from the Staff Management page. We shall look at both these pages in turn. We start with the Staff Members page.

Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Members** area

By default you should see a full list of active staff, similar to this:


Staff Members
Users And Groups » Staff Members
What Next?
Filters
Search
Search
Staff Type
All
Status
Active
Inactive
All
Staff Member Type
All
Staff Members
Export
NAME
JOB TITLE
REPORTS TO
RIGHTS
Alger, Aaron | Head of English | Miles-Hayler, Claire | Leadership Team
Al-Idrisi, Muhammad | Geography Department Head | French, Justin | Leadership Team
Anderson, Barry | Head of ICT | Miles-Hayler, Claire | Leadership Team
Augustine, Page | Religious Education Teacher | Best, Findlay | Teaching Staff & Admin Staff
Banks, Joe | Deputy Head | Miles-Hayler, Claire | Leadership Team
Banks, George | Art Teacher | Not Set | Middle Leaders
Banneker, Evelyn | Mathematics Teacher | Menzies, Mischa | Teaching Staff & Admin Staff
Barbossa, Franklin | Art Department Head | Farriday, Callum | Leadership Team
Barlow, Claire | Maths Teacher | Hodson, Charlotte | Teaching Staff & Admin Staff
Barradell, Joseph | IT Manager | Miles-Hayler, Claire | Administrator
Belfon, Onika | Music Department Head | French, Justin | Middle Leaders

Notice:

- The first column has a clock icon from which you can access the staff member's diary
- Clicking on the staff member's name brings up their Staff Summary page
- It is normal that all staff members have a job title, report to a line manager and have a standard user rights group set
- To the right of the Rights column are the standard pencil icon to edit and the bin icon to remove

Practical task
1. Click on the pencil icon next to the new staff member you added a few minutes ago or a random staff member if your system uses MIS or Active Directory 2. Add realistic data to the fields on the Details tab which are Not Set by either selecting from the dropdown list, typing in free text or ticking checkboxes. 3. Choose the User Rights for an ordinary teacher, set the staff member to report to you, set the Login Area to Home Page, do not tick the CPD Coordinator or Cover Supervisor checkboxes but tick the Classroom Observer checkbox 4. Add a photo if you have one to hand 5. From the What Next? Button select **Save**

You are returned to the Staff Members list and you should see any changes to job title, line manager and rights group which you have just made.

We shall now look at the fields on the rest of the tabs of Edit Staff Member.

Practical task
1. Click on the pencil next for the staff member you are working on 2. The information you entered previously should be displayed 3. Work your way across the other seven tabs adding realistic data 4. Save your data from the What Next? Button options

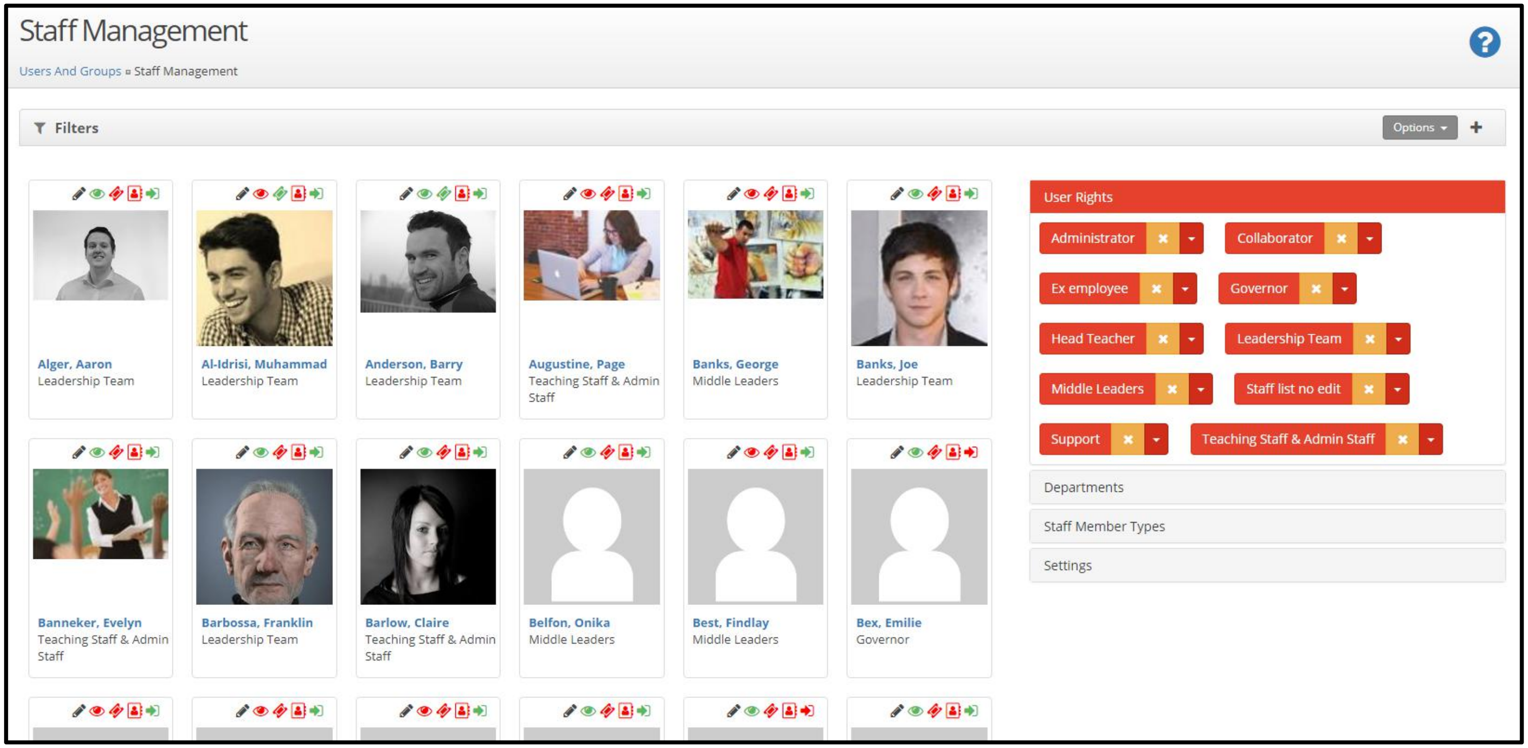
Be aware that:

- The data on the Groups tab relates only to SEF rights (see Course Two for further details)
- You may tick several checkboxes on each of the various tabs
- The Staff Member Type selection is important as it controls which Performance Management Objectives, Standards and Observations are automatically added to the staff member's new review

We shall now look at the Staff Management page which can also be used for updating staff details.

Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Management** area

The screen should resemble this one:



You need to be aware that whilst this page is very useful for doing quick updates (particularly bulk updates) it must be used with great care. For example, if you set a User Right to 'Apply to All', that update cannot be reversed.

Notice above the photo of each staff member are five icons:

- The pencil symbol is for editing the staff member
- The eye icon indicates if the staff member is an observer (the icon is green) or not (red icon)
- The next icon along indicates if the staff member is a CPD Coordinator (green) or not (red)
- The person icon indicates if the staff member is a Cover Supervisor(green) or not (red)
- The arrow icon indicates if the staff member is active (green) or inactive (red)

Clicking on the staff member name takes you to their Staff Summary page

The various items on the right-hand side of the screen - the User Rights, the Departments, the Staff Member Types and the Settings are used to update all staff at once, or to update individual staff by dragging and dropping.

Practical task
1. Scroll down so your staff member is visible on the screen 2. Drag a different **User Right** to the photo of your staff member 3. Select the pencil to check the user right change has been made 4. Return to the Staff Management screen and reverse the change by dragging the original user right to the staff member 5. Click on the **Departments** header 6. Drag an extra Department (Subject) on to your staff member 7. Click on the **Staff Member Types** header 8. Drag a different Staff Member Type to your staff member 9. Reverse your change by dragging the original Staff Member Type 10. Click on the **Settings** header 11. Change one of the setting, then change it back again.

You will have noticed your staff can be 'Active' or 'Inactive'. We recommend you make any staff inactive if they are absent from your establishment on a temporary basis, for example if they go on secondment or on maternity leave.

You also have the option to remove staff via the bin icon. We recommend removing staff who have left permanently, for example if they retired or taken another job. Removed staff are not deleted completely and can always be restored to the staff list at a later date.

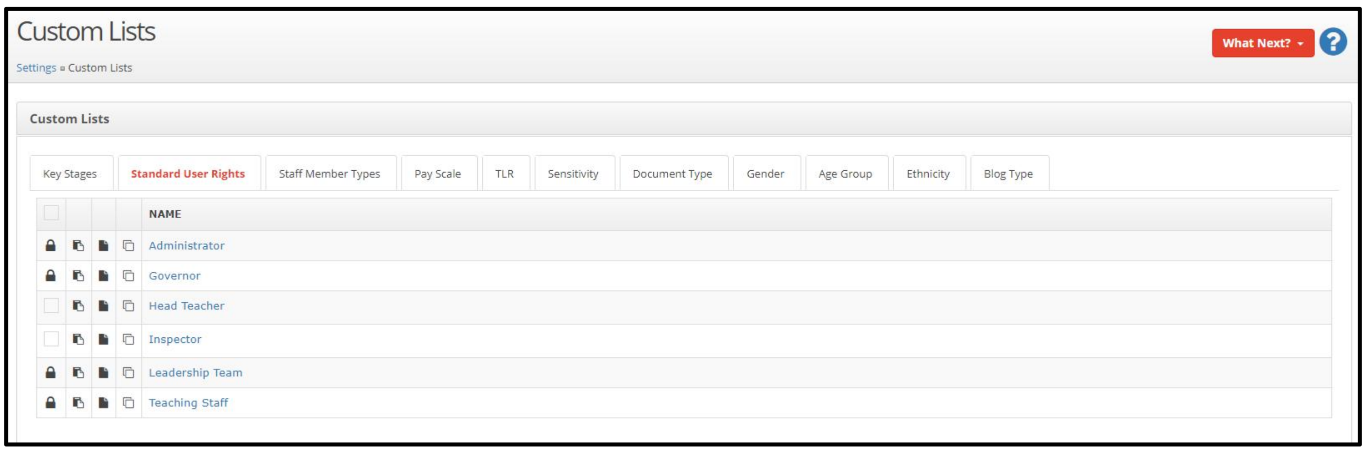
Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Members** area 3. Change the Status filter from Active to **Inactive** to see the list of inactive staff 4. From the What Next? Button dropdown select **Restore** to see the list of staff who have been removed 5. Take your staff member and first edit them and set their status to inactive. Check they now appear in the inactive list 6. Make them active again 7. Click the bin icon to remove them 8. Go to the list of removed staff by selecting **Restore** from the What Next? button 9. Check you staff member is in the list 10. Click the Restore icon to the right of their name 11. Check they are back in the active list

2 User Rights

The features of the iP system available to your staff depend on their user rights. In this section we shall see how you can adjust the user rights of your staff so they are able to perform the actions they need to perform but do not have access to functionality and data not appropriate for them given their job role.

Practical task
1. From the left-hand contents menu, click the **Settings** button 2. Click **Go** in the **General Settings** area 3. Select **Custom Lists** 4. Select the **Standard User Rights** tab

Your screen should be similar to this:

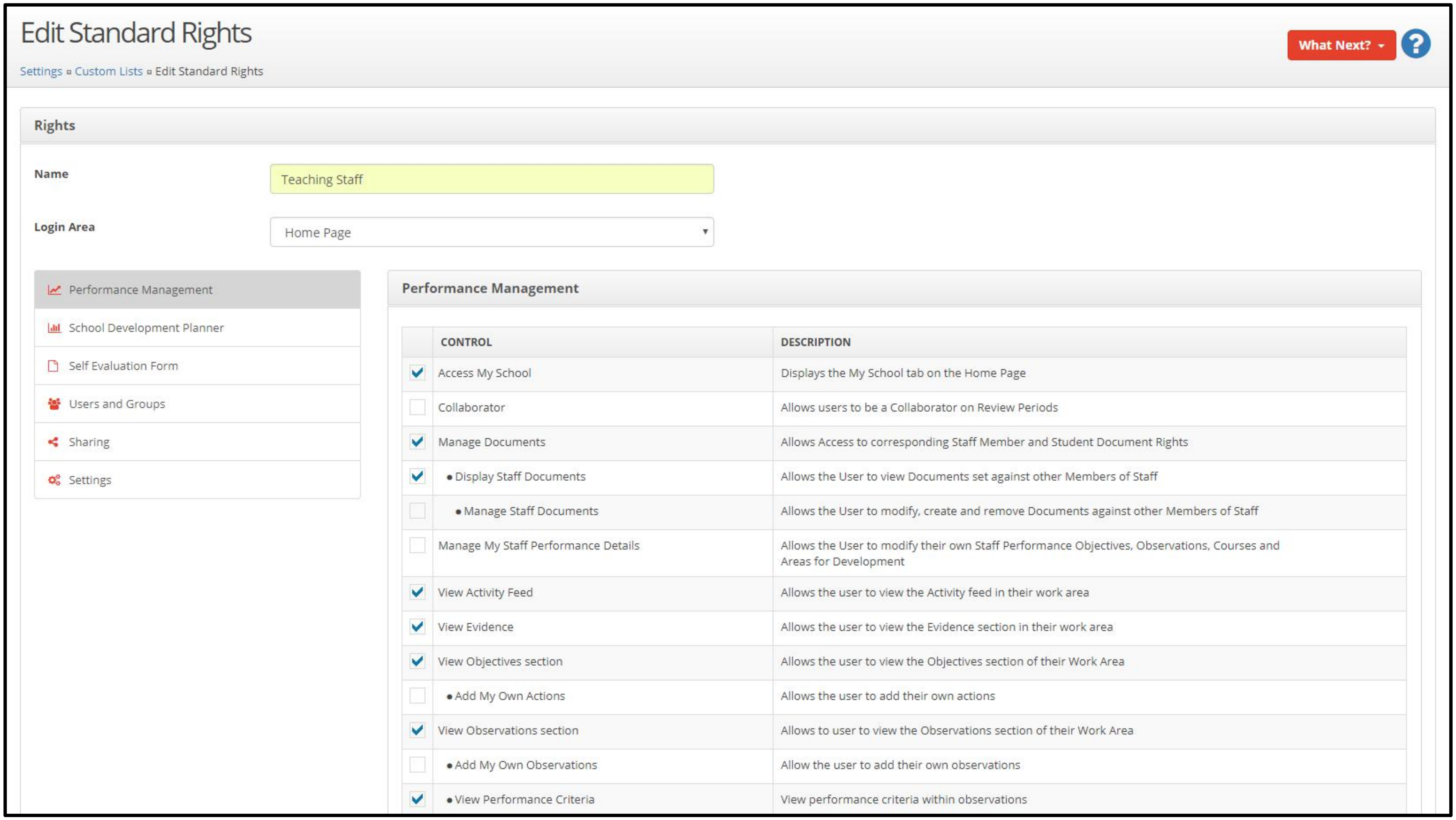


Notice the four icons to the left of the User Rights titles

- The padlock symbol indicates the standard user right is currently in use and cannot be removed for this reason
- The next icon is for Collaborator Default Rights (collaborators are staff who have access to staff reviews without being the line manager of the reviewee)
- The next icon is for Development Plan Default Rights
- The copy icon is to allow you to copy the standard user right as a prelude to adding an extra standard user right

Practical task
1. Click on the **Teaching Staff** standard user right

Notice the rights are spread over six tabs as in the screenshot below:



Rights can be turned on and off by ticking or unticking the checkboxes and the updates saved via the **Save** button in the What Next? Dropdown.

As well as altering the standard user rights items, you can alter individual user rights via Edit Staff Member

Practical task
1. From the left-hand contents menu, click the **Users and Groups** button 2. Click the **Go** button in the **Staff Members** area 3. Click the edit pencil next to your staff member 4. Click the edit pencil next to the **User Rights** field 5. Click OK on the warning message as you are not going to loose any changes 6. The staff members personal user rights are shown - these would initially have matched the standard user rights of the selected standard user right 7. You cannot subtract from the standard user right set of ticks but you can add extra rights 8. Tick a couple of extra user rights 9. User the What Next dropdown to click **Save** to save your updates

3 Staff Member Types and preparing for new reviews

Staff Member Types are used to link Performance Management Objectives, Standards and Observation Forms to members of staff given their job role within the organisation.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **General Setting** 3. Select **Custom Lists** 4. Select the **Staff Member Types** tab

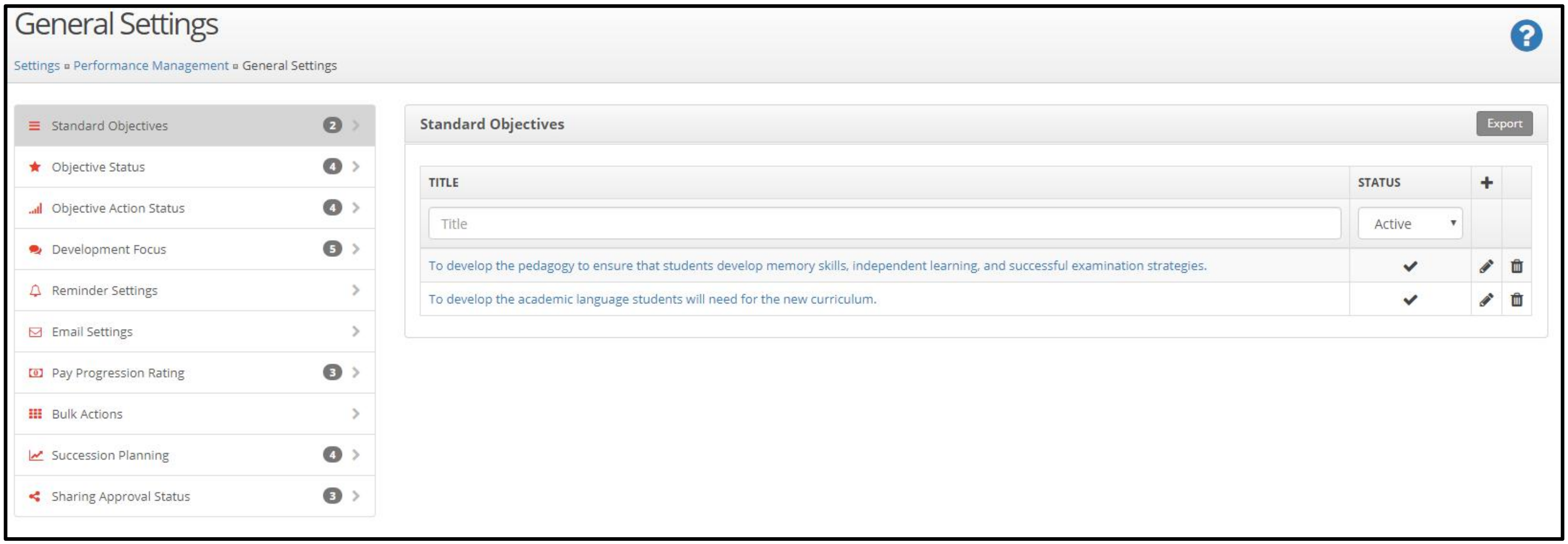
Notice:

- The padlock icon to indicate which Staff Member Types are in use and therefore cannot be deleted
- The count on the right-hand side to indicate how many staff of that type there are
- The What Next? Button has options to add or remove
- Clicking on the Staff Member Type allows you to edit the description

We shall now see how the Staff Member Types are set against Objectives, Standards and Observations Forms.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **Performance Management Setting** 3. Select **General**

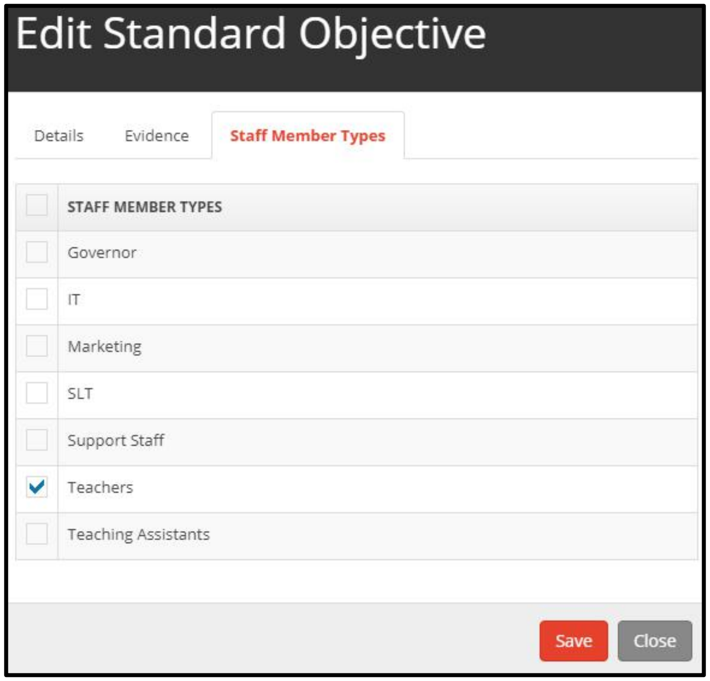
The Performance Management General Settings screen should be similar to this:



There are ten tabs with the top one being for Standard Objectives.

Practical task
1. Select the **Standard Objectives** tab 2. Click on the pencil next to one of the standard objectives 3. Select the **Staff Member Types** tab

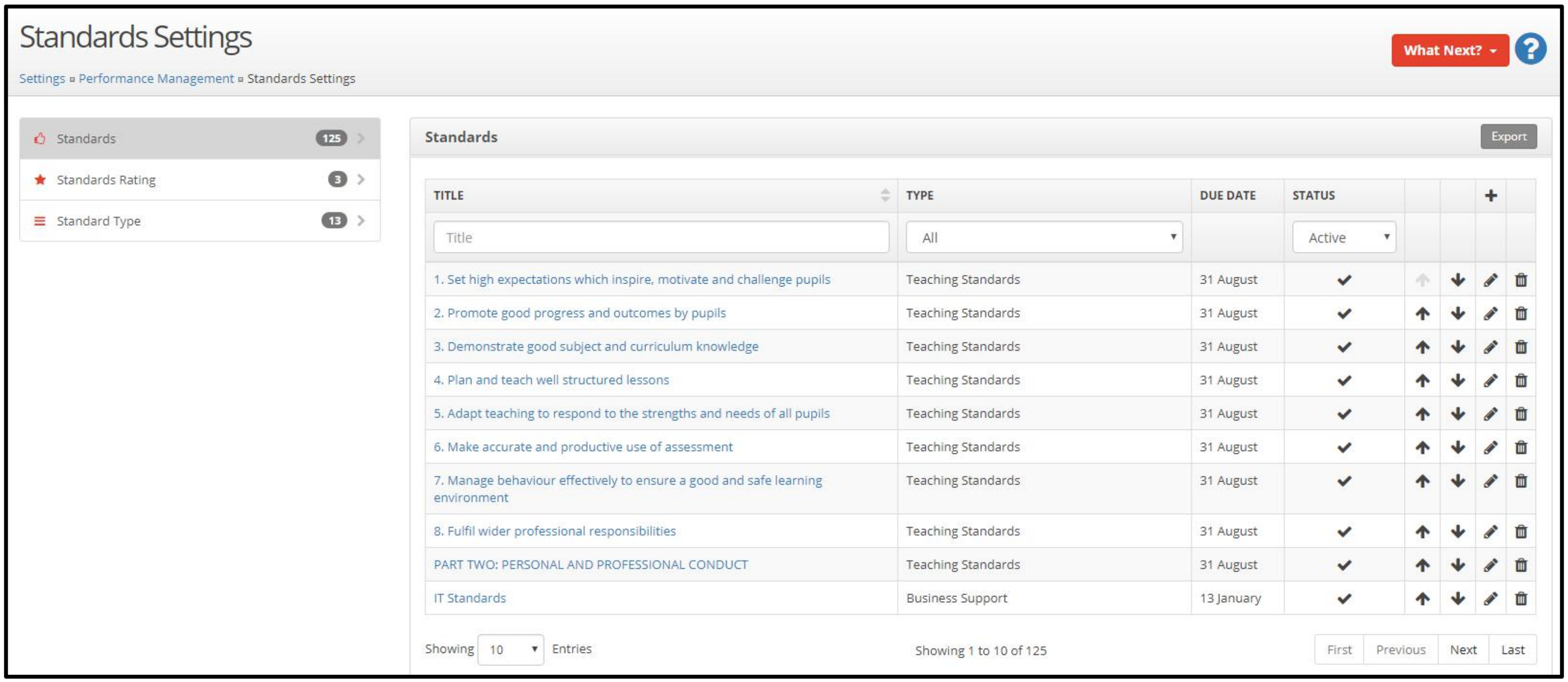
The Staff Member Types tab should display the same list as we saw in the Settings area. One or more Staff Member Types can be ticked. Staff of those types will have the standard objective automatically loaded into their new reviews by default. The staff's line manager can manually remove the objective if it is not appropriate to the particular staff member.



The Standards are connected to staff in the same way.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **Performance Management Setting** 3. Select **Standards**

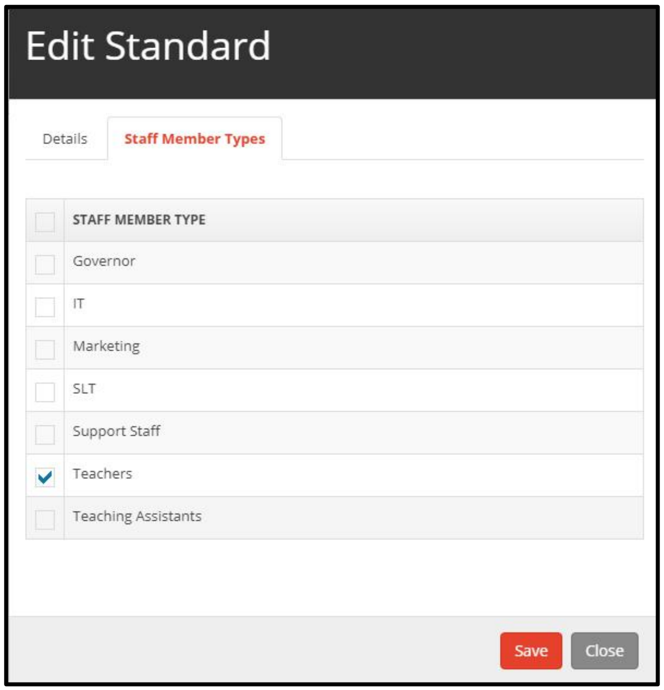
The Standard Settings screen display should be similar to this:



Practical task

1. Select the **Standards** tab
2. Click on the pencil next to one of the standards
3. Select the **Staff Member Types** tab

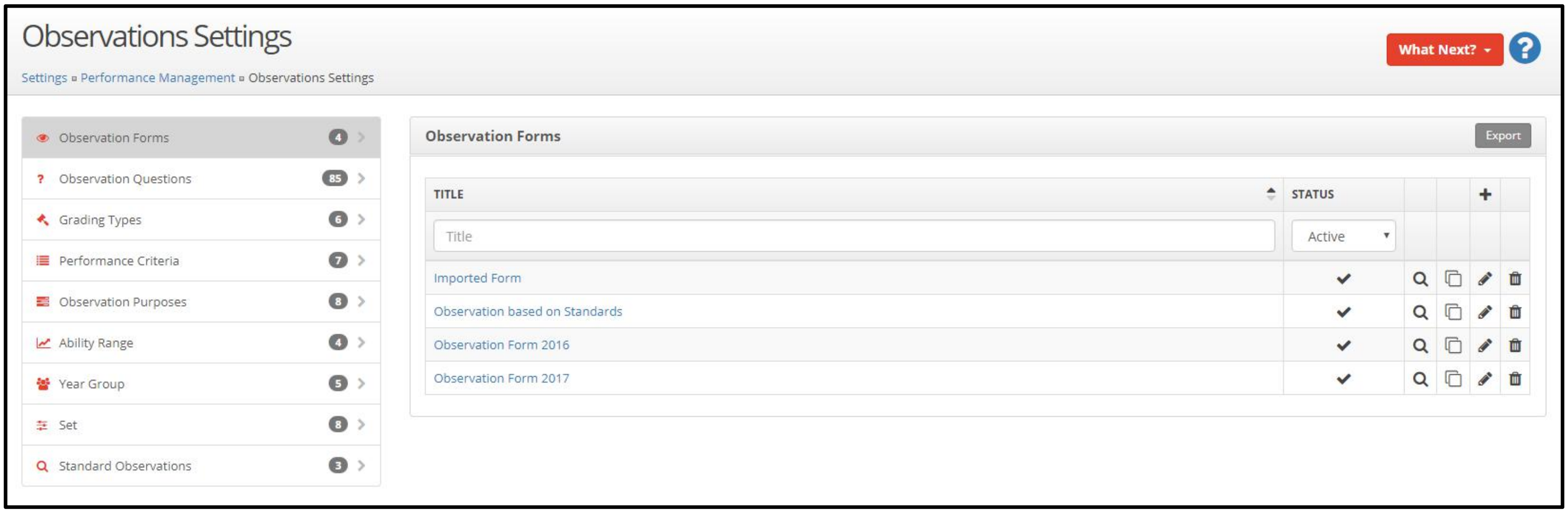
The Staff Member Types tab should display the same list as we saw in the Settings area. One or more Staff Member Types can be ticked. Staff of those types will have the standards automatically loaded into their new reviews by default. The staff's line manager can manually remove the objective if it is not appropriate to the particular staff member.



Finally Observation Forms are connected to staff in the same way.

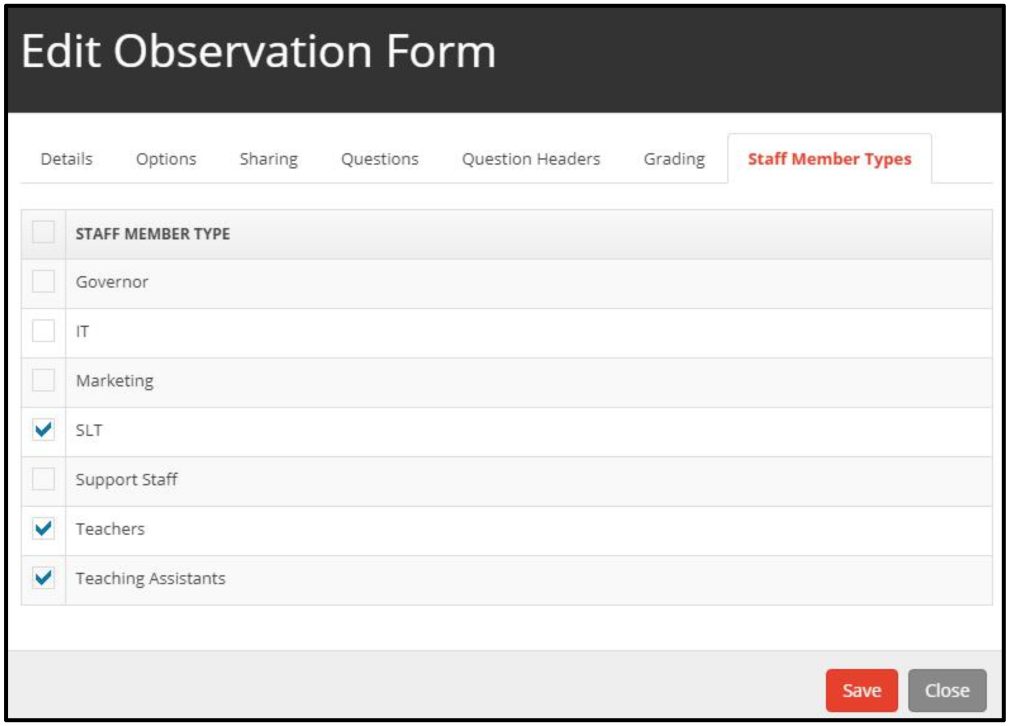
Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **Performance Management Setting** 3. Select **Observations**

The Observation Settings screen display should be similar to this:



Practical task
1. Select the **Observation Forms** tab 2. Click on the pencil next to one of the observation forms 3. Select the **Staff Member Types** tab

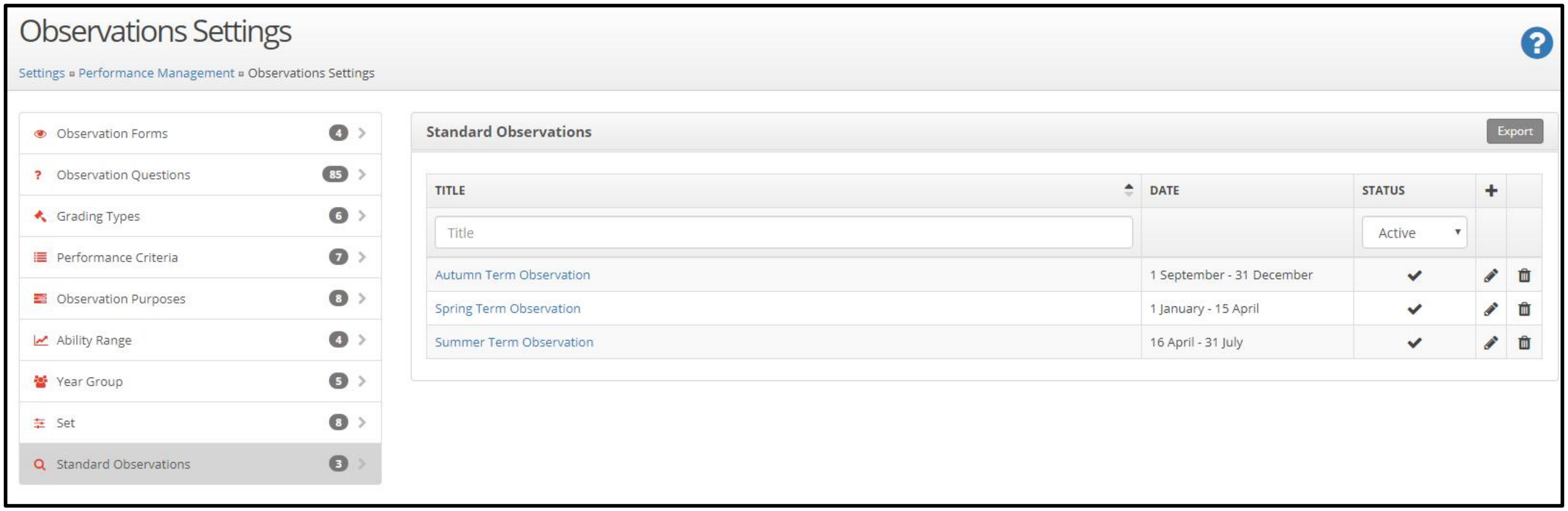
The Staff Member Types tab should display the same list as we saw in the Settings area. One or more Staff Member Types can be ticked.



Observation Forms themselves do not automatically get defaulted on to new reviews for staff of matching Staff Member Types. A further preparation step is required. This is to create a Standard Observation based on the Observation Form.

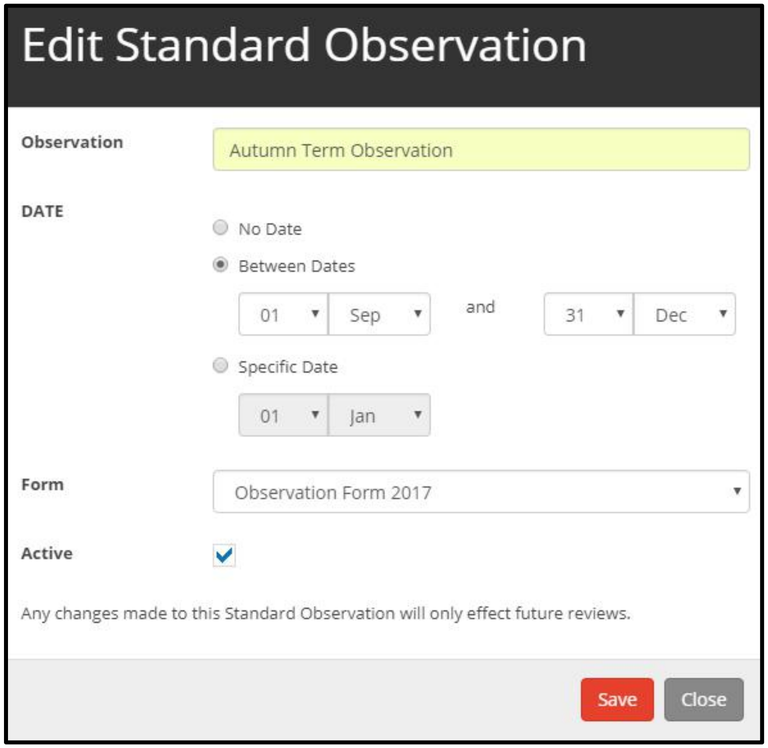
Practical task
1. Select the **Standard Observations** tab

This tab shows the list of Standard Observations. It should be similar to this:



Practical task
1. From the **Standard Observations** tab click on the pencil next to one of the listed standard observations

You will notice the Standard Observation is linked to one of the active Observation Forms and may be set to fall on a specific date or within a date range. A standard observation like this one would be added by default into a review for an appropriate staff member.



Practical task
1. From the **Standard Observations** tab click on the plus icon ('+') and add a further Standard Observation between dates 16 April and 31 July based on 'Observation Form 2017' 2. Click **Add** to add the new standard observation 3. Check the new observation is listed on the page

3 Creating a new Observation Form

If your establishment requires a new Observation Form you could request we create it for you, but, alternatively, you could create it yourself.

As you have already seen, an observation form has various items of header information, then a series of questions, then further summary information at the foot of the form.

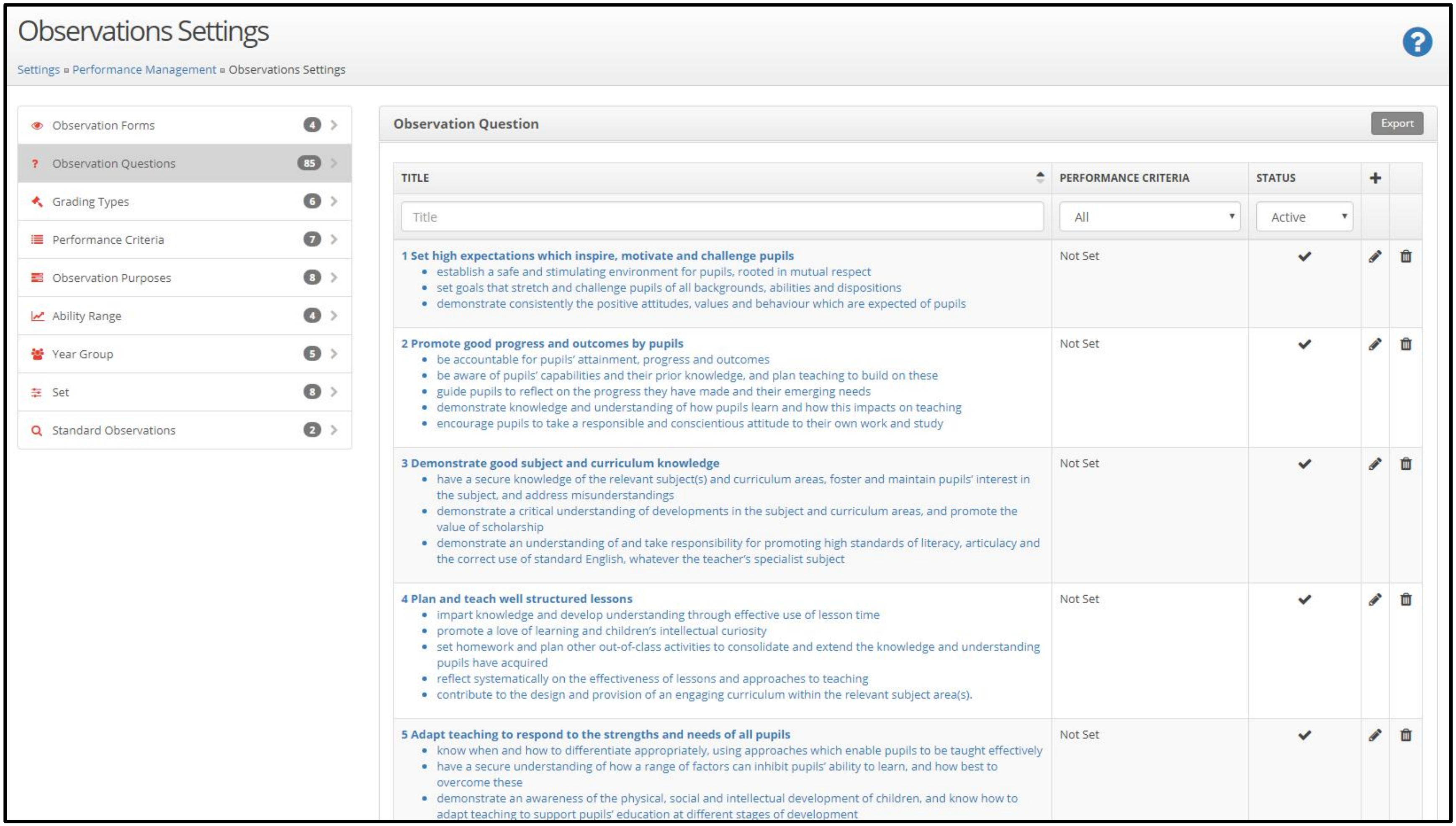
Both questions and observation forms can be either graded or ungraded and the observations can either be available to view by the person observed or set up to be hidden from the observee.

If you are basing your new observation form or an old one, you probably want to make a copy of the old form and then modify it appropriately. Also you can base a new form on already existing questions or you can create new questions then put them in your new observation form.

We shall start by creating a couple of questions.

Practical task
1. Select **Settings** from the left-hand contents menu 2. From the **Performance Management** area select **Observations** 3. Select the **Observation Questions** tab

Your screen should look similar to this one:

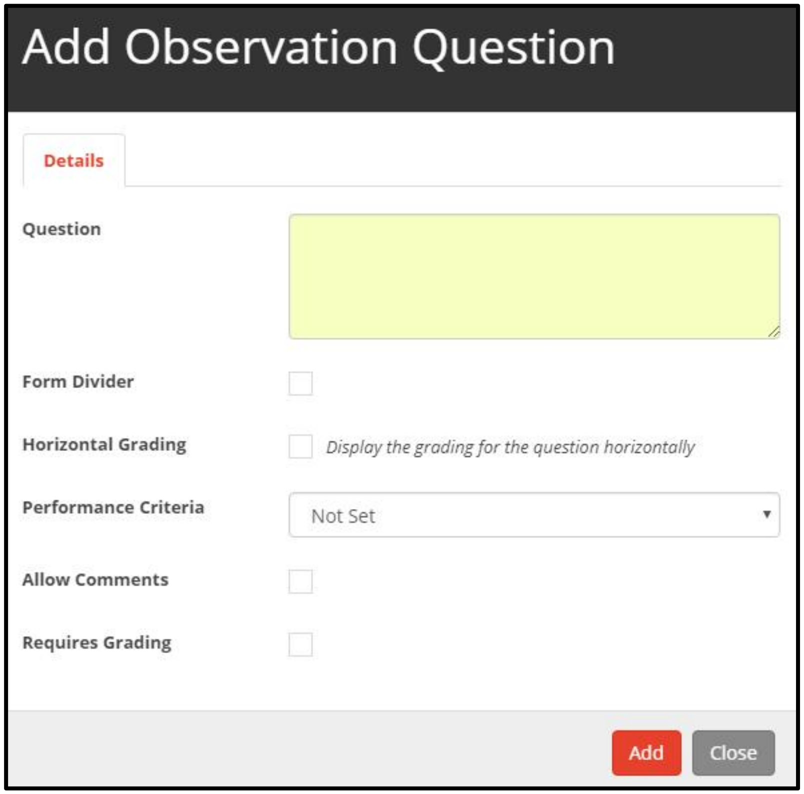


Notice:

- The questions can be clicked on to open for editing
- A column displays the Performance Criteria set against the question, although this may not be set
- A filter allows you to filter just to the active questions, or just to the inactive ones, or to all questions
- An active question has a tick and an inactive one a cross
- The pencil can be used to edit the question
- The right-hand icon can be used either to make an active question inactive or an inactive question active

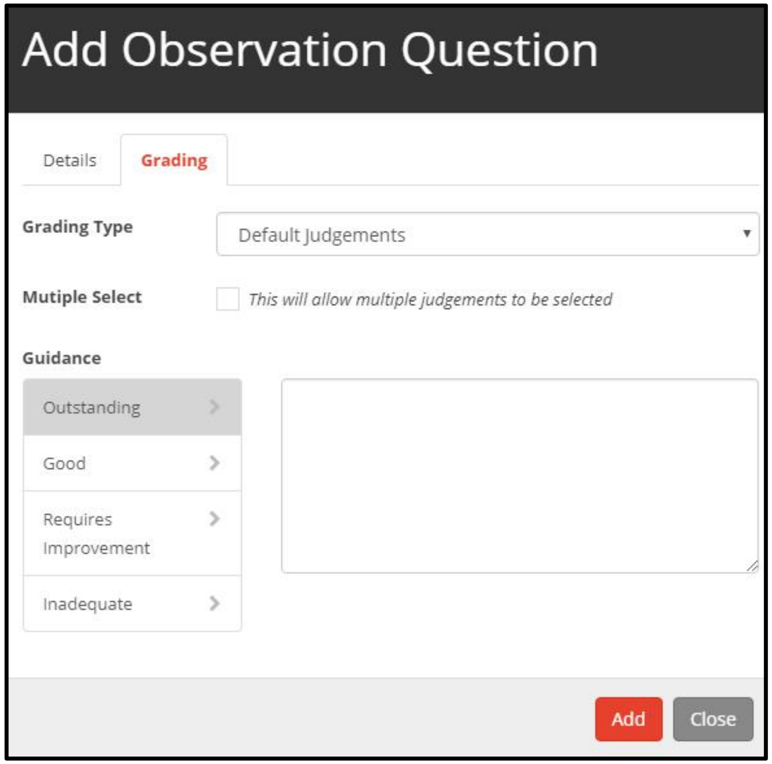
Practical task
1. From the **Observation Questions** tab click on plus icon (‘+’) to add a new question

The Add Observation screen should display as follows:



Practical task
1. Enter a realistic question in the yellow text box
2. Select an option from the Performance Criteria dropdown
3. Tick the **Allow Comments** and the **Requires Grading** checkboxes

Notice that when you ticked the Grading checkbox a second tab called ‘Grading’ displays. It should look similar to this:



Practical task
1. Notice you may have more that one Grading Type but select the default 2. Select each Guidance item in turn and add some text to justify the grading 3. Select **Add** to add your new question

Check your question is in the list and the data you entered is present.

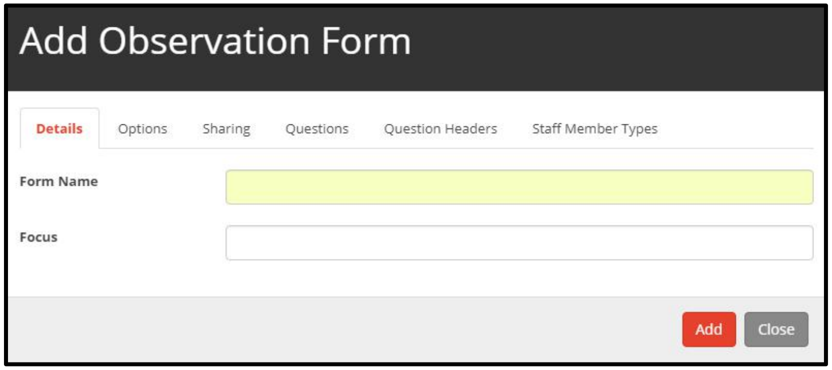
We shall now create a further two questions, one using horizontal grading and a non-grading question.

Practical task
1. Click on plus icon ('+') to add another new question 2. Enter a realistic question in the yellow text box 3. Select an option from the **Performance Criteria** dropdown 4. Tick the **Horizontal Grading** checkbox 5. Tick the **Allow Comments** and the **Requires Grading** checkboxes 6. Fill in appropriate text on the **Grading** tab 7. Click **Add** to add the question 8. Click on plus icon ('+') to add another new question 9. Enter a realistic question in the yellow text box 10. Select an option from the **Performance Criteria** dropdown 11. Do not tick any checkboxes to create a non-grading question 12. Click **Add** to add the question

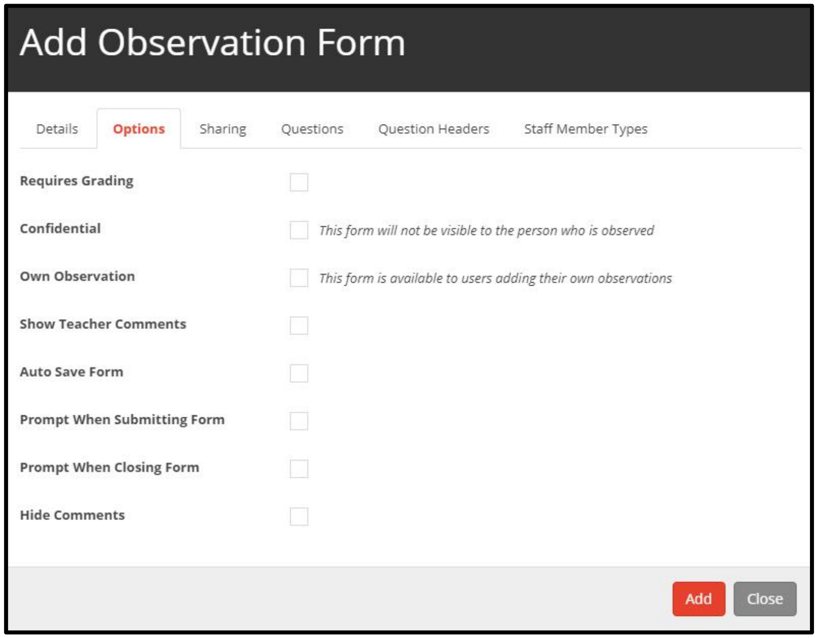
Having created three new questions, we shall now create an observation form which includes these three questions.

Practical task
1. Select **Settings** from the left-hand contents menu 2. From the **Performance Management** area select **Observations** 3. Select the **Observation Forms** tab 4. Click on the plus icon ('+')

The Add Observation Form screen should open up and look like this:



Practical task
1. Enter a Form Name and a Focus 2. Click on the **Options** tab

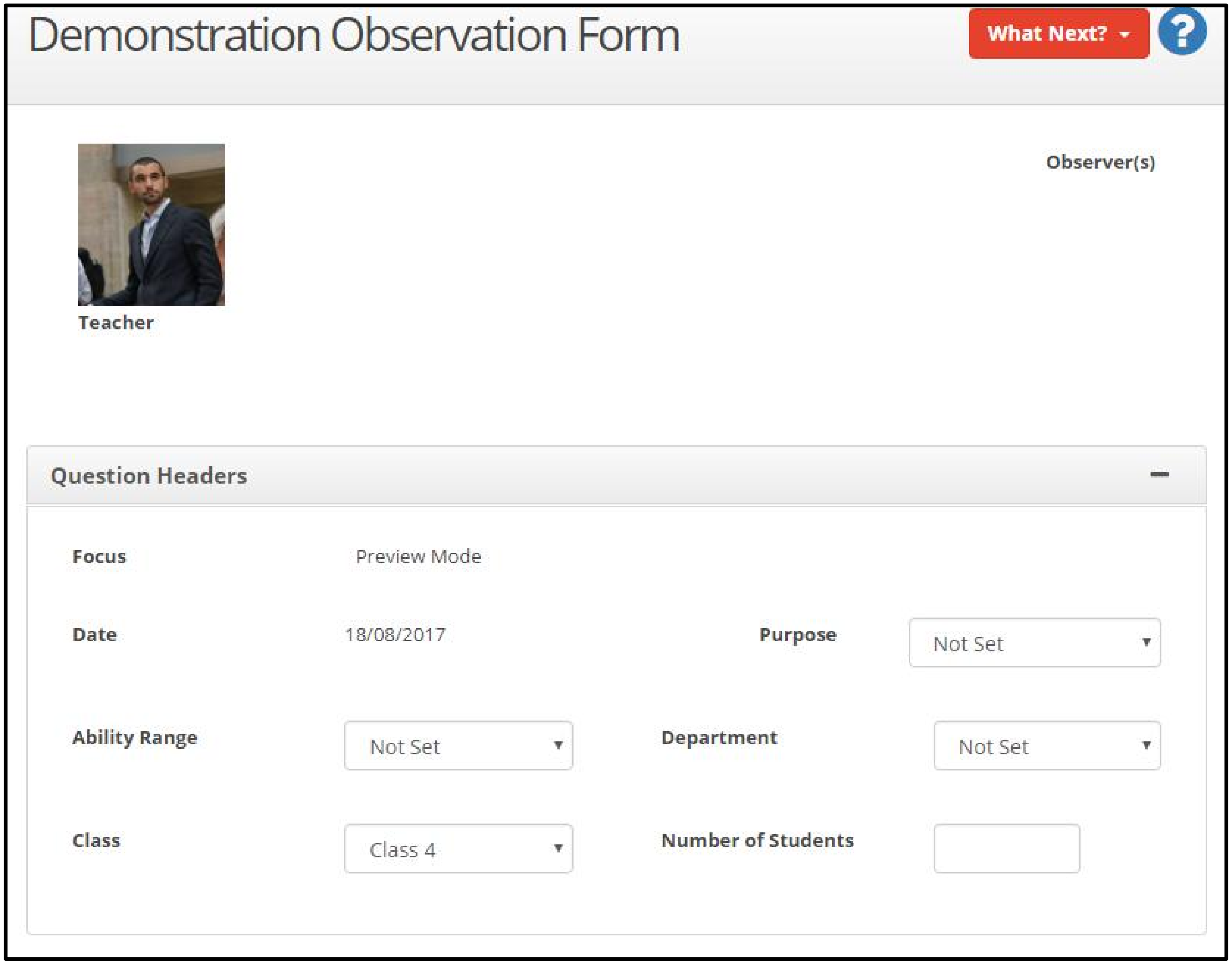


You will see eight checkboxes here. We shall just set the first one.

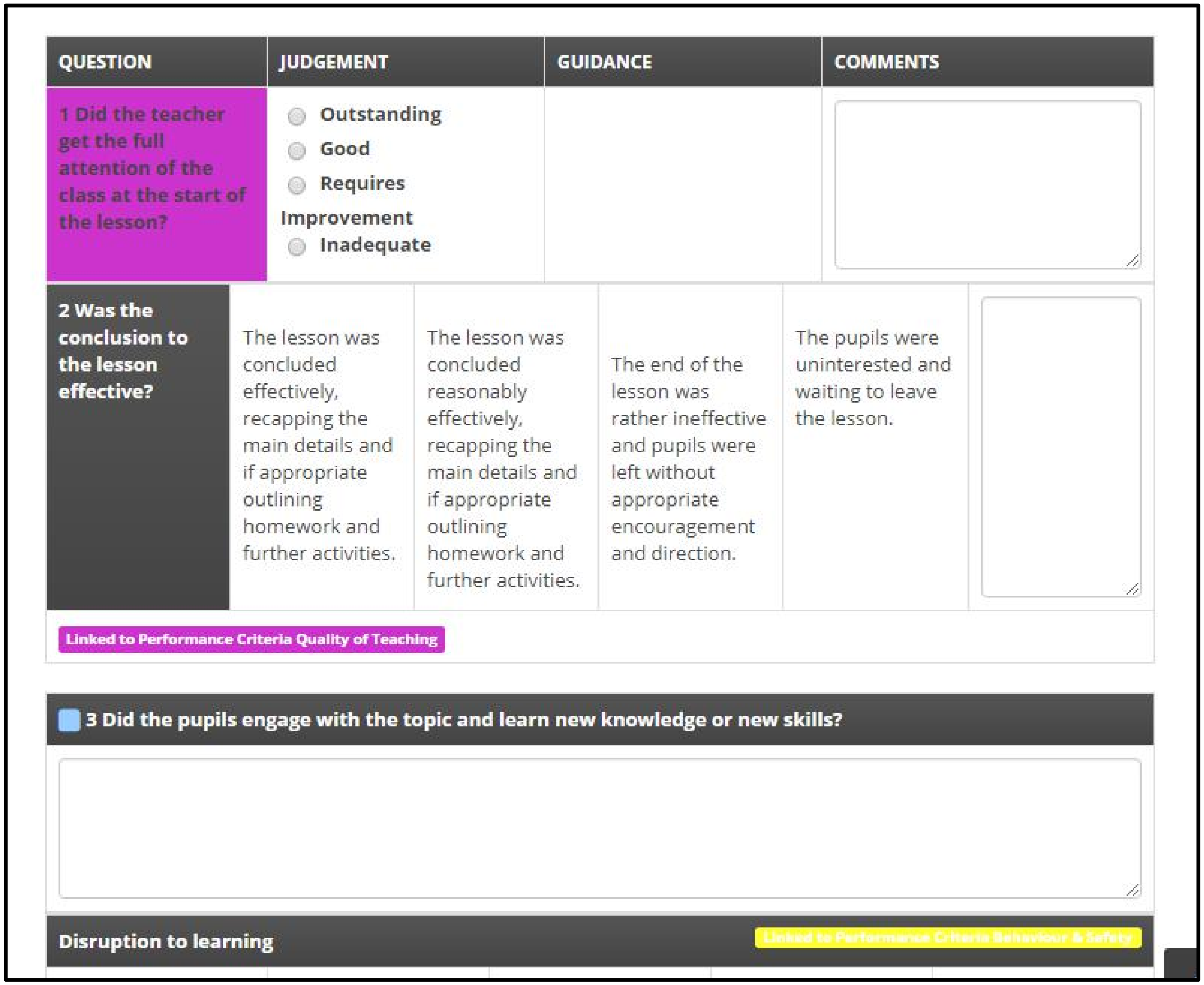
Practical task
1. Just tick the **Requires Grading** checkbox from this page 2. Move to the **Questions** tab 3. Click the **Add Questions** button 4. Tick the three questions you have just created and two further questions from the list 5. Move to the **Question Headers** tab 6. Tick three or four checkboxes such as Ability Range, Areas for Development, Class, Department, Number of Students 7. Move to the **Grading** tab 8. Enter some guidance text for the displayed grades 9. Move to the **Staff Member Types** tab and tick Teaching Staff 10. Click **Save** to save your Observation Form 11. Click the magnifying glass icon to Preview the form you have just created

The form you have created will look a bit of a mishmash of styles and section sizes as we have created questions using different options. But you should recognize the threefold structure of header information at the top, questions with answer boxes in the middle and summary information at the end.

The header area of your observation form should be similar to this one:



Your three questions should display in the middle of the form something like this:



QUESTION	JUDGEMENT	GUIDANCE	COMMENTS
1 Did the teacher get the full attention of the class at the start of the lesson?	Outstanding Good Requires Improvement Inadequate		

2 Was the conclusion to the lesson effective?	The lesson was concluded effectively, recapping the main details and if appropriate outlining homework and further activities.	The lesson was concluded reasonably effectively, recapping the main details and if appropriate outlining homework and further activities.	The end of the lesson was rather ineffective and pupils were left without appropriate encouragement and direction.	The pupils were uninterested and waiting to leave the lesson.	

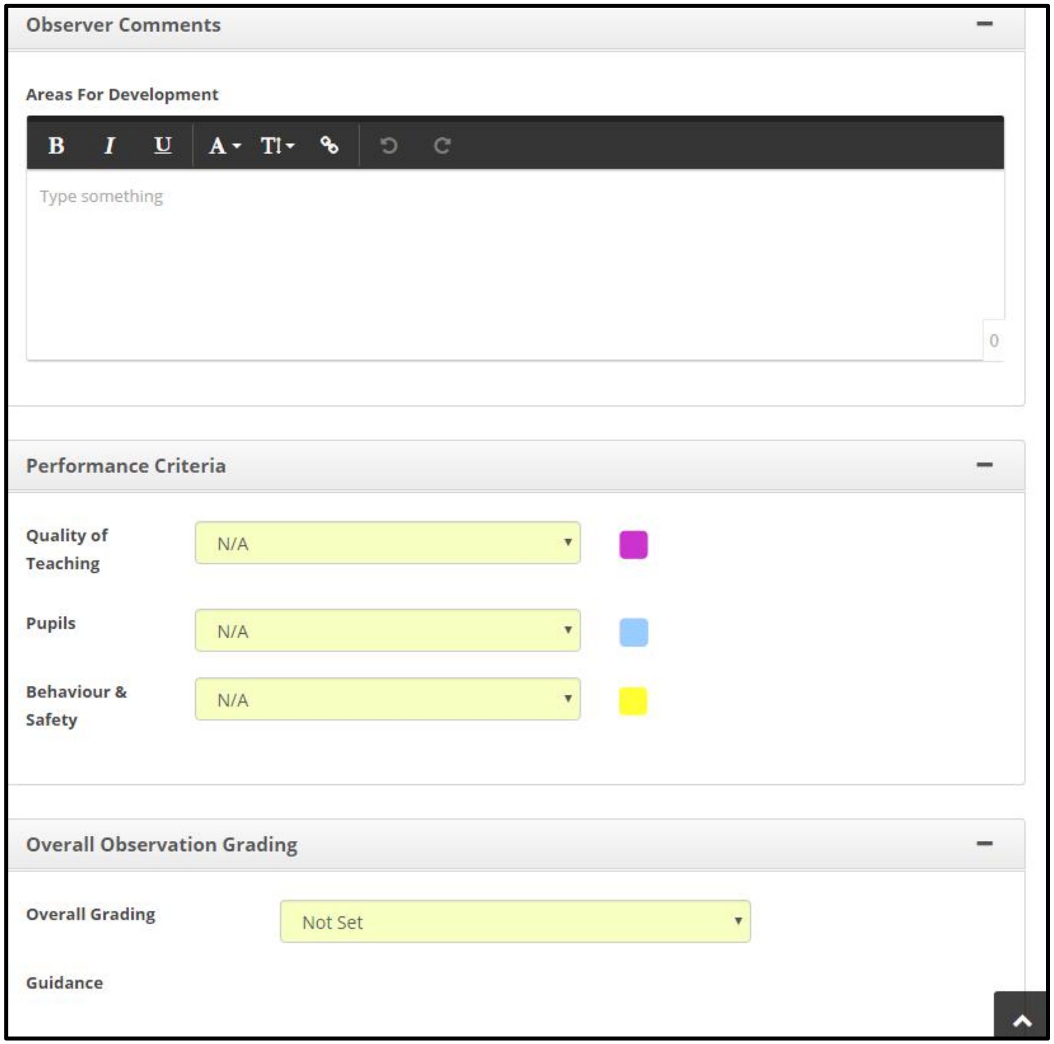
Linked to Performance Criteria Quality of Teaching

3 Did the pupils engage with the topic and learn new knowledge or new skills?

Disruption to learning

Linked to Performance Criteria Behaviour & Safety

The foot of the form should be similar to this:



We shall use the form to perform an observation by adding an observation from the Observations page.

Practical task
1. Click on the down arrow next to **My Work** in the left-hand contents area 2. Select **Observations** from the expanded list

This page is for reporting on submitted observations as well as adding new ones. At the top of the page are graphs showing the percentages of overall grades as well as for each of the performance criteria used on the system.

Underneath the graphs will be a full list of submitted observations in the specified date range.

Observations

Export

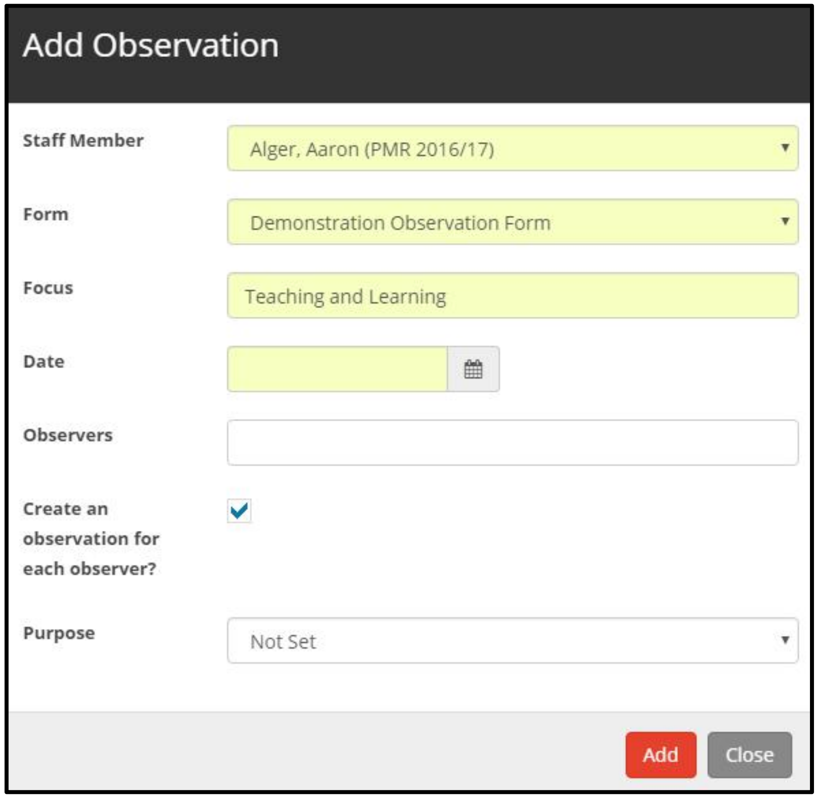
DATE	FOCUS	FORM	STAFF MEMBER	OBSERVER
28/07/2017	Teaching and Learning	Observation based on Standards	Banks, Joe	Miles-Hayler, Claire
03/05/2017	T&L	Observation Form 2017	Alger, Aaron	Miles-Hayler, Claire
17/03/2017	Teaching & Learning	Observation Form 2016	Lodder, Rachel	Miles-Hayler, Claire
10/03/2017	Teaching & Learning	Observation Form 2016	Durham, Nina	Miles-Hayler, Claire
10/03/2017	T&L	Observation Form 2016	Glover, Neil	Lodder, Rachel
09/03/2017	T&L	Observation Form 2016	Lodder, Rachel	Miles-Hayler, Claire
	Spring Term Observation	Observation Form 2016	Brown, Debbie	Lodder, Rachel
	Spring Term Observation	Observation Form 2016	Cooke, Beth	Hodson, Charlotte
27/02/2017	Teaching	Observation based on Standards	Parker, Martin	Hodson, Charlotte
23/02/2017	Teaching & Learning	Observation based on Standards	Alger, Aaron	Miles-Hayler, Claire
11/02/2017	Teaching	Observation based on Standards	Linthwaite, Jasper	Miles-Hayler, Claire
06/02/2017	T&L	Observation Form 2016	Banks, Joe	Miles-Hayler, Claire
01/02/2017	Teaching	Observation based on Standards	Lawday, Andrew	Lawday, Andrew
31/01/2017	Teaching	Observation based on Standards	Lawday, Andrew	Miles-Hayler, Claire
31/01/2017	Learning SchooliP	Observation based on Standards	Lawday, Andrew	Lawday, Andrew
31/01/2017	Teaching	Observation Form 2016	Glover, Neil	Miles-Hayler, Claire
27/01/2017	T&L	Observation Form 2016	Barlow, Claire	Lodder, Rachel
26/01/2017	T&L	Observation based on Standards	Brown, Debbie	Lodder, Rachel

Notice:

- The coloured square on the left indicates the grading or whether the observation was a non-graded one
- The filtering at the top of the page can allow you to select observations of a particular type only
- Below the submitted observations is a list of staff without an observation in the date range period
- Finally at the foot of the page there is a list of planned observations which are overdue
- The three data areas have an Export button for exporting out of the system the data
- The What Next? button has an Add Observation button and a Print button

Practical task
1. From the **What Next?** button dropdown select **Add Observation**

The Add Observation screen pops up with default data in some of the fields.

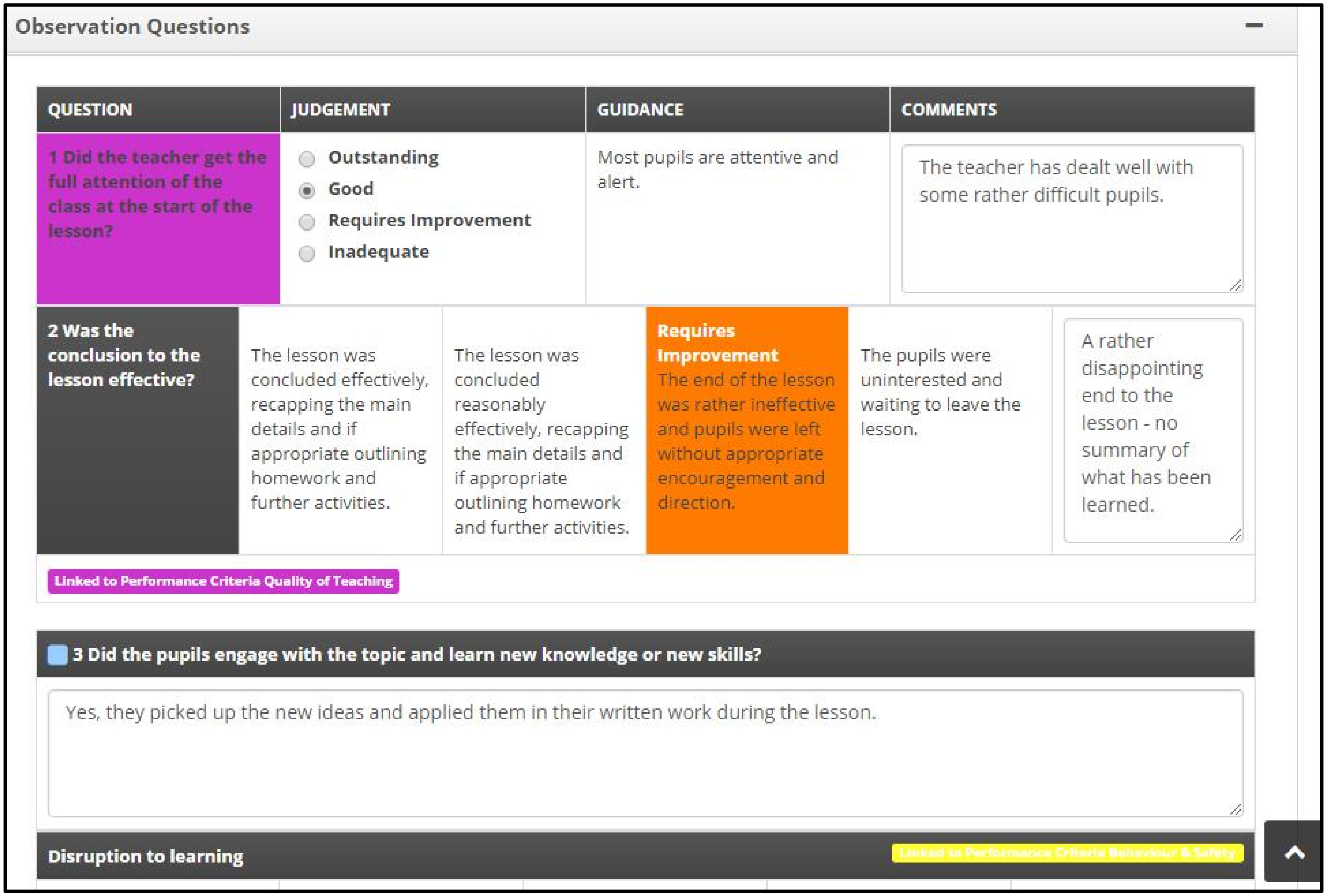


Practical task
1. Select your recently added staff member from the dropdown list 2. Select your recently created observation form from the dropdown list 3. Add appropriate text in the Focus area 4. Set today's date for the observation 5. Check your name is defaulted in the Observers text area 6. Leave the checkbox ticked to create an observation for each observer 7. Select an appropriate Purpose 8. Click the **Run Now** button

The observation form should pop up on your screen for you to fill in.

Practical task
1. Fill in the text boxes in the Question Headers section with realistic data 2. For the first question you created check that when you select a judgement the appropriate guidance text is displayed 3. Add a comment for this question 4. For the question you set to have horizontal grading check that by selecting different gradings the grading selected is highlighted in a different colour 5. Add a comment for this question 6. For your non-graded question, you should just have a text area

This part of the form should now look similar to this:



Observation Questions

QUESTION	JUDGEMENT	GUIDANCE	COMMENTS
1 Did the teacher get the full attention of the class at the start of the lesson?	Outstanding Good (selected) Requires Improvement Inadequate	Most pupils are attentive and alert.	The teacher has dealt well with some rather difficult pupils.

2 Was the conclusion to the lesson effective?	The lesson was concluded effectively, recapping the main details and if appropriate outlining homework and further activities.	The lesson was concluded reasonably effectively, recapping the main details and if appropriate outlining homework and further activities.	**Requires Improvement** The end of the lesson was rather ineffective and pupils were left without appropriate encouragement and direction.	The pupils were uninterested and waiting to leave the lesson.	A rather disappointing end to the lesson - no summary of what has been learned.

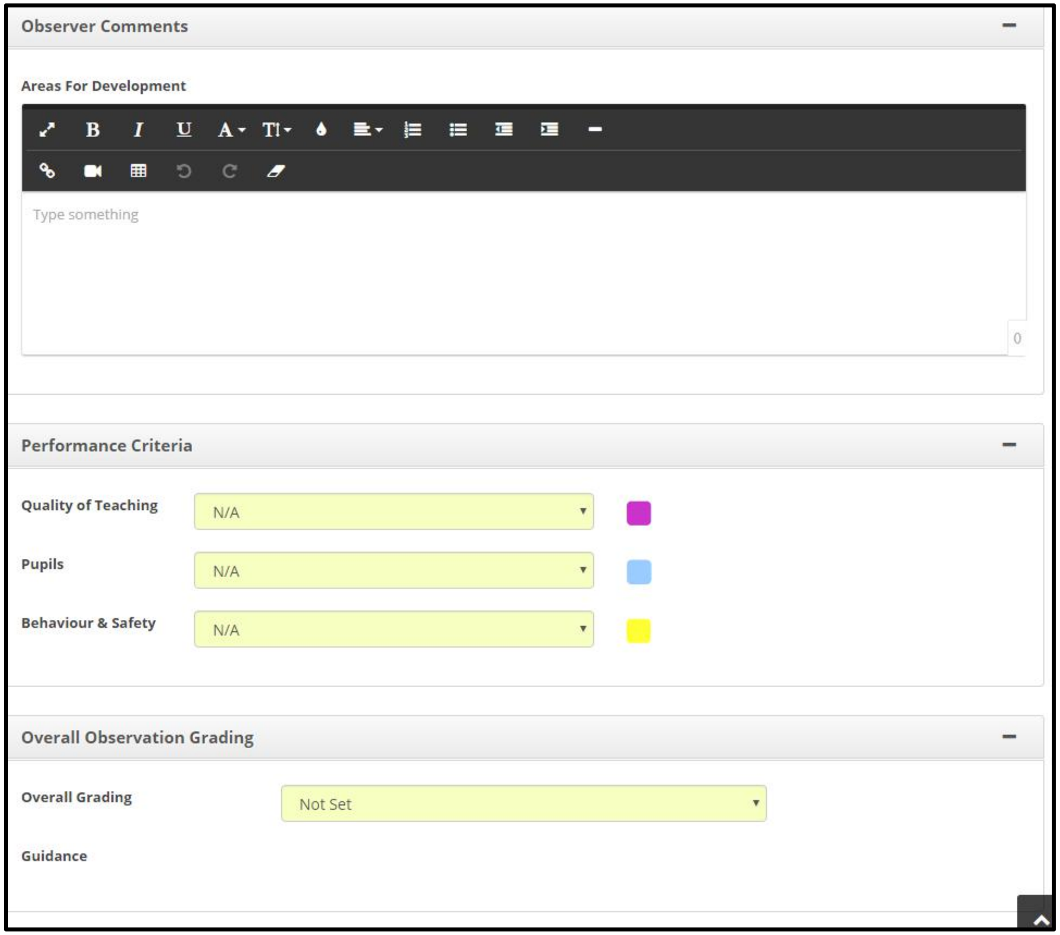
Linked to Performance Criteria Quality of Teaching

3 Did the pupils engage with the topic and learn new knowledge or new skills?

Yes, they picked up the new ideas and applied them in their written work during the lesson.

Disruption to learning Linked to Performance Criteria Behaviour & Safety

The foot of the form should reflect the Performance Criteria you chose for your questions and allow you to grade these as well as set an overall grade.



Practical task
1. Fill in the rest of the observation 2. Select **Submit** from the **What Next?** dropdown options 3. Check you submitted observation is in the list of submitted observations

5 Collaborators

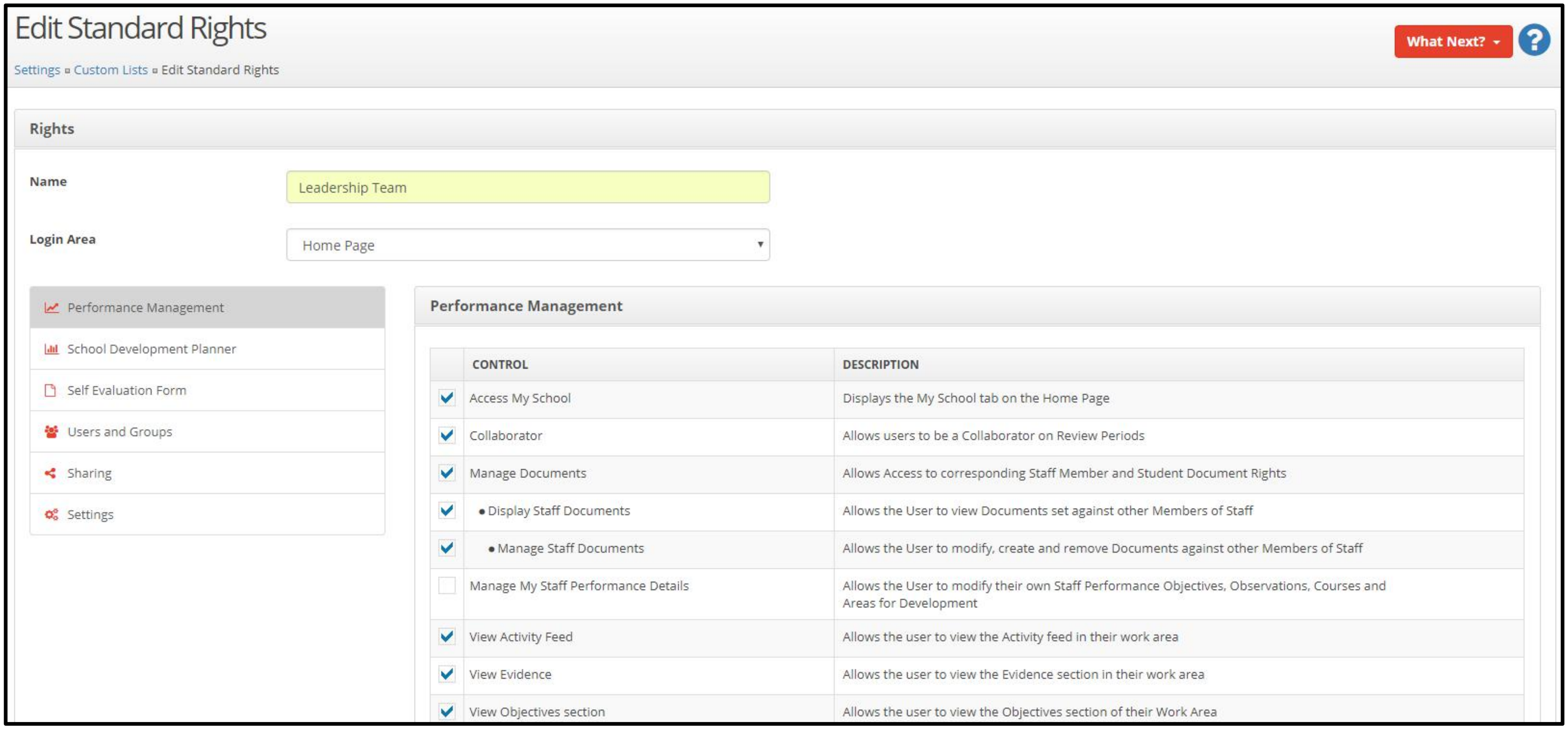
The default position within the iP system is that it is just the line manager of the staff member who manages the staff member's review and observes their lessons and updates their objectives and standards. However if you wish for more staff to be involved in the reviewing process, you can use the collaborator functionality.

A collaborator is a member of staff who assists in the review process but is not the reviewee's line manager.

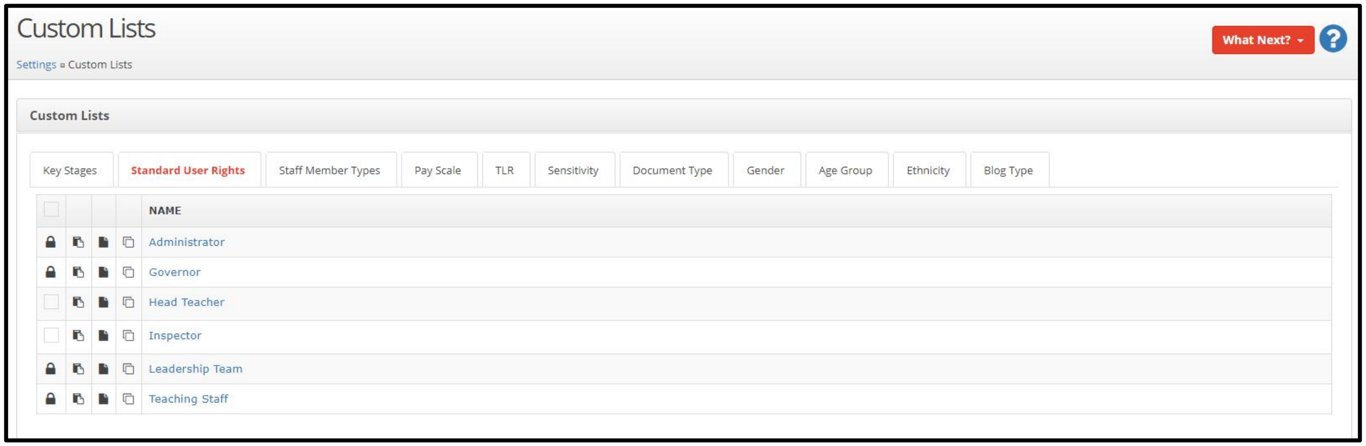
You first must decide which of your staff can act as collaborators and then adjust their user rights accordingly. You can adjust the user rights of staff members individually, or you can set some standard user rights groups so all members of that group are collaborators. For example, you may wish the Leadership standard user rights group to be set so all members of the Leadership have the collaborator right.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **General Settings** 3. Select **Custom Lists** 4. Select the **Standard User Rights** tab 5. Click on the **Leadership Team** item 6. With the **Performance Management** tab selected, ensure the **Collaborator** right is ticked 7. From the **What Next?** button select **Save**

The screen you updated should be similar to this one:

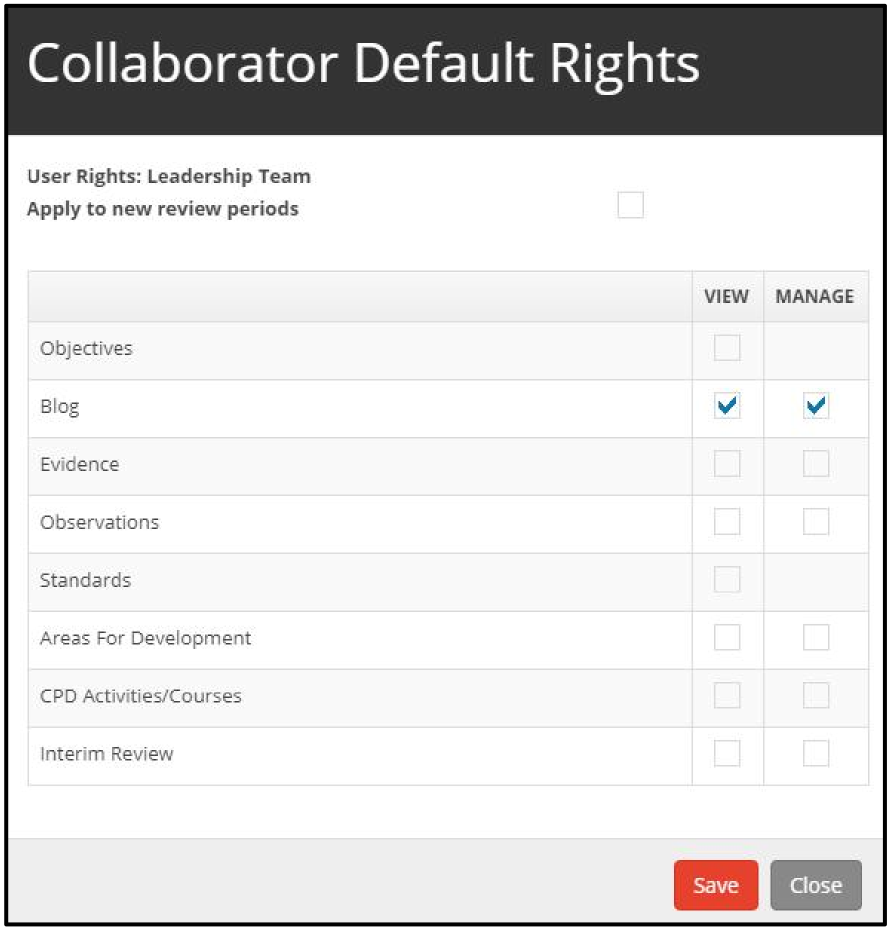


As well as turning the Collaborator user right on or off, you can also set up default permissions concerning what your collaborators can do given their standard user setting. To see this return to the Standard User Rights screen.



Practical task
1. Select **Settings** from the left-hand contents menu 2. Select **General Settings** 3. Select **Custom Lists** 4. Select the **Standard User Rights** tab 5. Click on the **Collaborator Default Rights** icon for the **Leadership Team** item

The screen that pops up has checkboxes to allow you to View or Manage various components of a staff review.

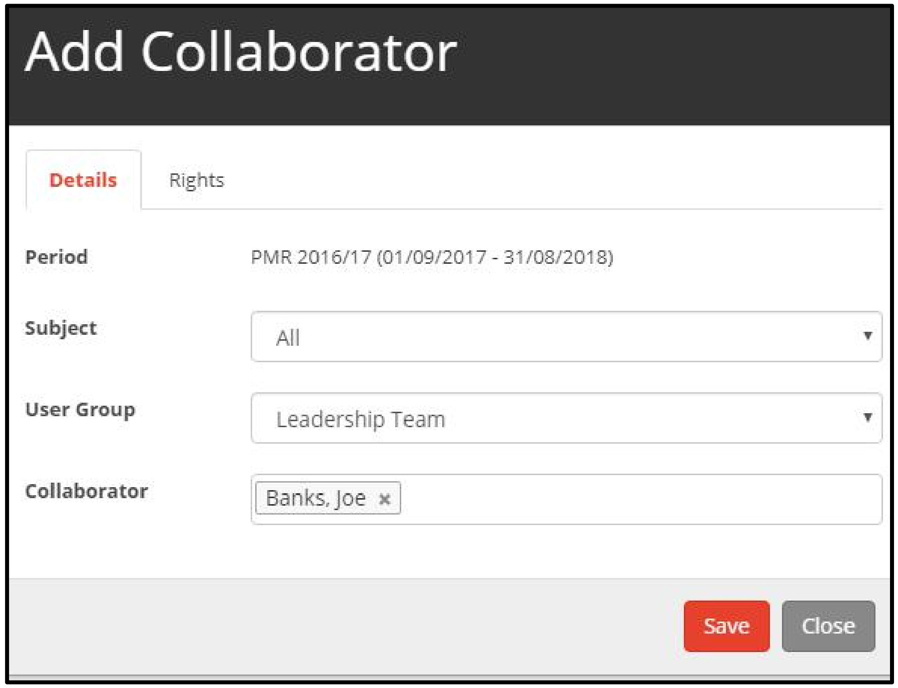


Practical task
1. Tick both View and Manage for Observations and View for Standards 2. Click the **Save** button to save your updates

If you now go to an open review, you should be able to add any member of the Leadership Team as collaborator on the review.

Practical task
1. From the left-hand contents menu expand the **My Details** item and select **My Staff** 2. Click on the name of one of your staff who currently has an open review 3. From the **What Next?** dropdown select **View Staff Summary** 4. Select the **Collaborators** tab 5. From the **What Next?** dropdown, select **Add Collaborator** 6. Select **Leadership Team** in the **User Group** text box 7. Select one of the leadership team in the **Collaborator** checkbox

The Add Collaborator Details tab should look similar to this:



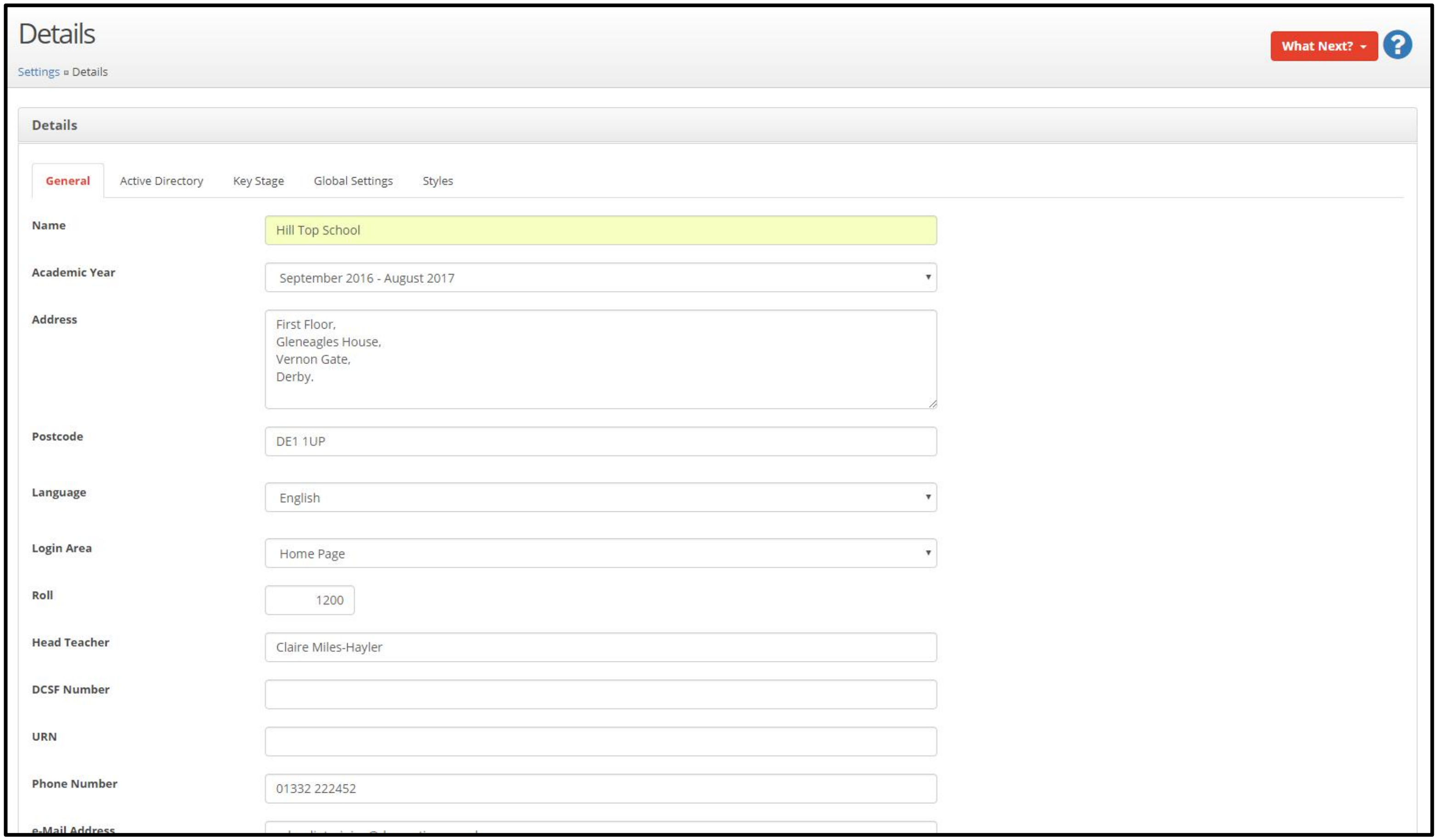
Practical task
1. Select the **Rights** tab and check the default rights you set up previously are displayed 2. Click the **Save** button to save your change 3. Log out and login as the Leadership Team member you have just added as a collaborator 4. Select **My Staff** from within the **My Details** area of the left-hand contents menu 5. Find the staff member and review you were made a collaborator for 6. You should be able to access the Work Area for the review in question and view and edit components in line with the settings you made earlier

6 Changing the Academic Year

Most screens within the iP system have filtering options to alter the information displayed on the screen. The filter options usually include the option to change the date range. The default date range corresponds to the Academic Year which has been set for the establishment. In this section we look at how to set up a new academic year and how to change the selected academic year.

Practical task
1. From the left-hand contents menu select **Settings** 2. From the **General Settings** select **Details** in the dropdown list from the **Go** button

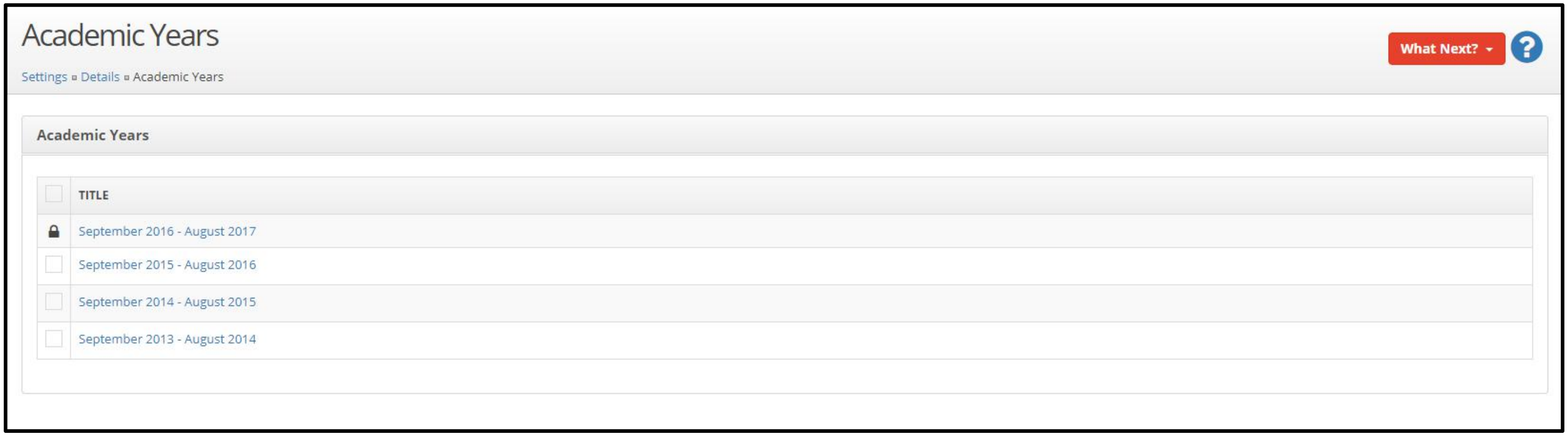
The screen opens on the General tab which has the most general information about your establishment. It will be similar to this:



Notice the Academic Year text box under the establishment name. We shall update this to next academic year.

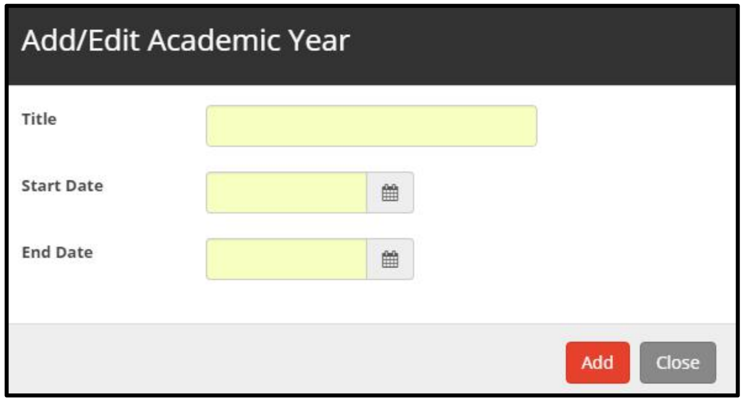
Practical task
1. From the What Next? button select **Academic Years**

The screen shows the Academic Years in your system. The currently selected one has a padlock next to it.



Practical task
1. From the What Next? button select **Add**

The popup screen requires a title and a start and end date for your new academic year:



Practical task
1. Enter details for the new academic year and click the **Add** button

The new academic year should be present in the list. You now need to return to the Details page and select it from the dropdown.

Practical task
1. Click on the **Details** link on the top-left of the Academic Years page 2. Click on the down arrow in the **Academic Year** text box 3. Select your new academic year from the dropdown list 4. From the What Next? button select **Save**

For your new academic year to take effect and control the default date ranges, you need to log out and log back in again as the default settings get set up upon login.

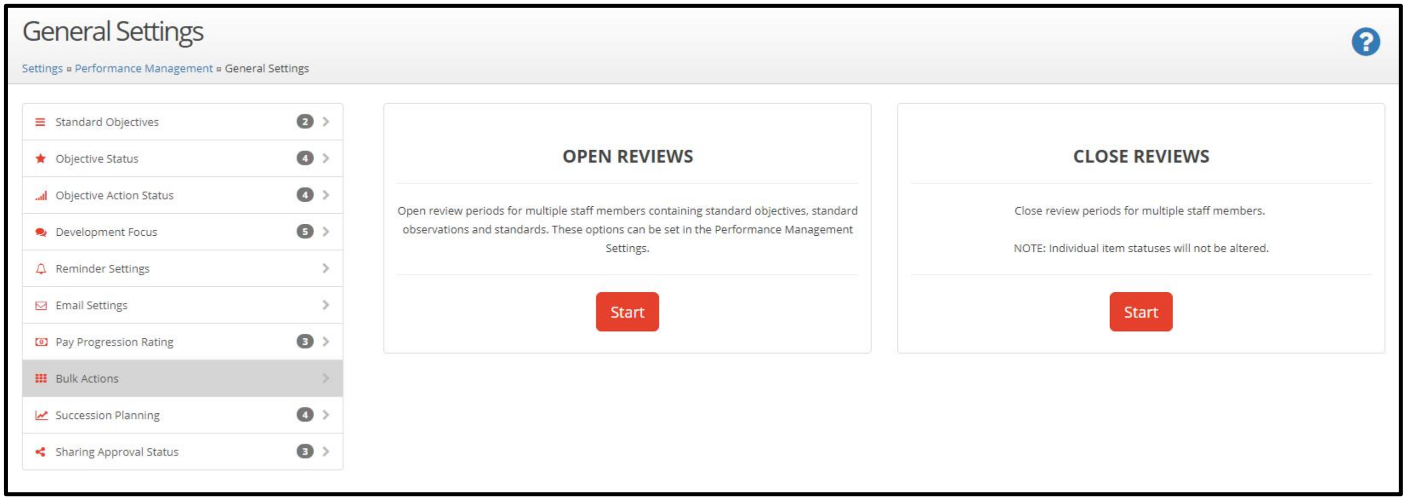
7 Bulk actions

A user with Administrator rights may be called upon to open reviews for multiple staff members or close reviews for multiple staff.

We see how this is done in this section.

Practical task
1. From the left-hand contents menu select **Settings** 2. From the **Performance Management** section select **General** in the dropdown list from the **Go** button 3. Select the **Bulk Actions** tab from the list of ten tabs on the left-hand side

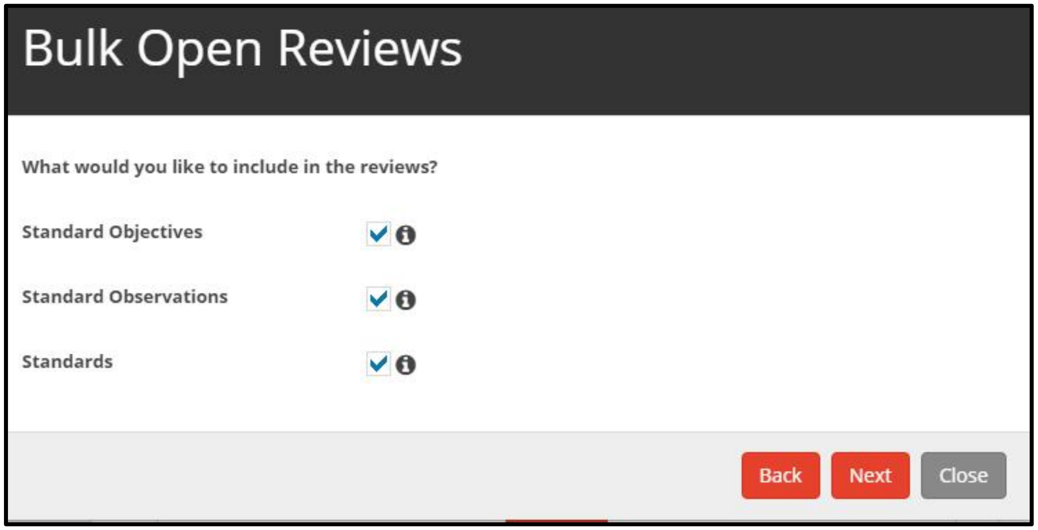
Your screen should display like this:



Open a bulk review by following the prompts in the Bulk Open Reviews wizard.

Practical task
1. From the Bulk Actions screen click the **Start** button inside the **Open Reviews** area 2. Enter a Review Title and leave the default dates for the current academic year 3. Click **Next** to move to the next page of the wizard

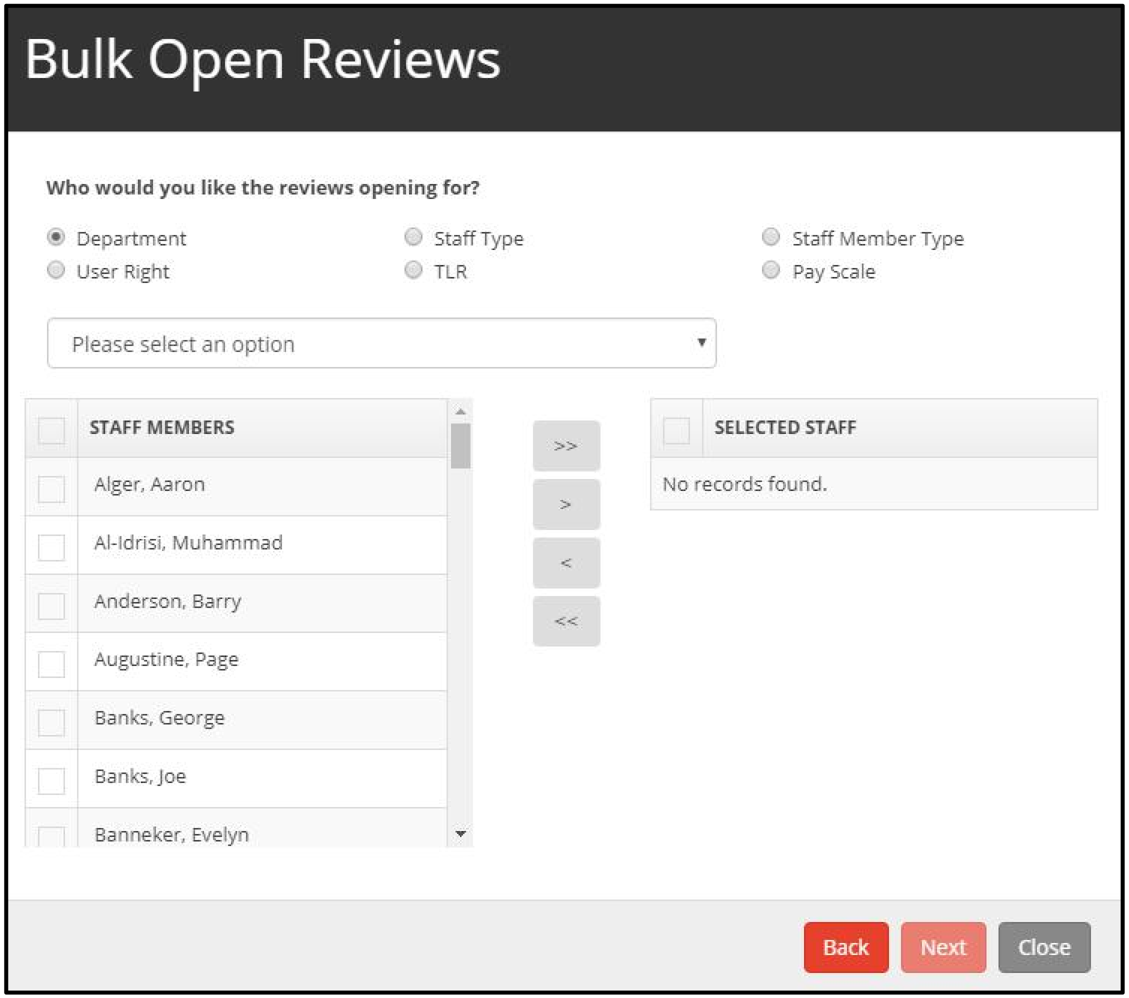
Notice you have an option screen concerning what is automatically add to the new reviews.



With these three checkboxes ticked, appropriate standard objectives, standard observations and standards will automatically be included in new reviews depending on matching staff member types, as described in section three of this course.

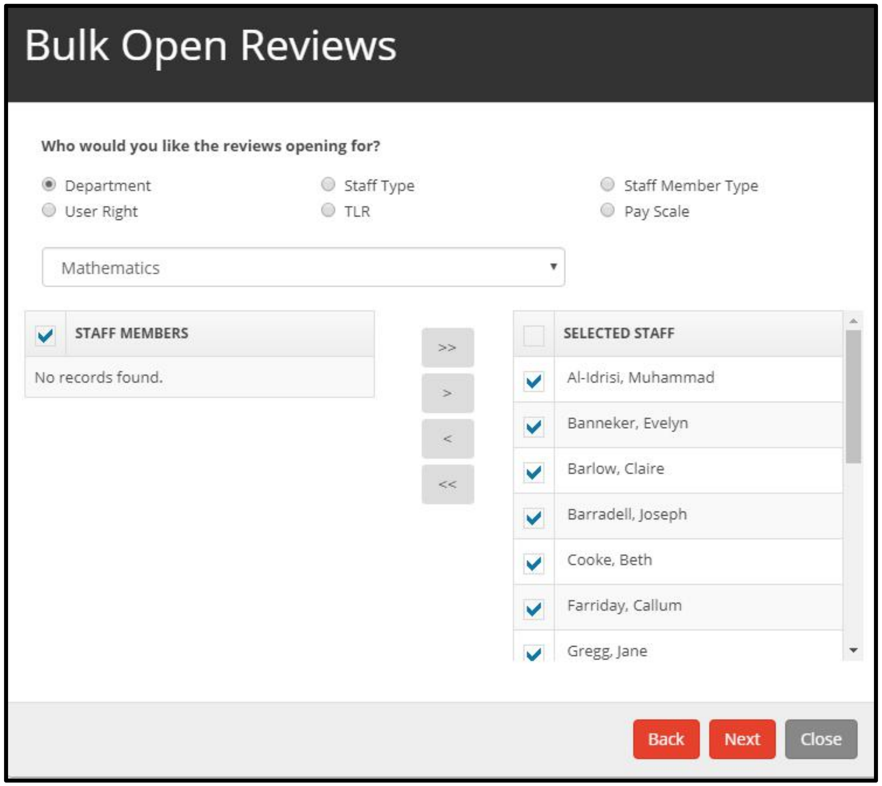
Practical task
1. Leave the three checkboxes tick and select the **Next** button

The next screen that comes up is for the user to select the correct staff members for the bulk opening of their reviews.



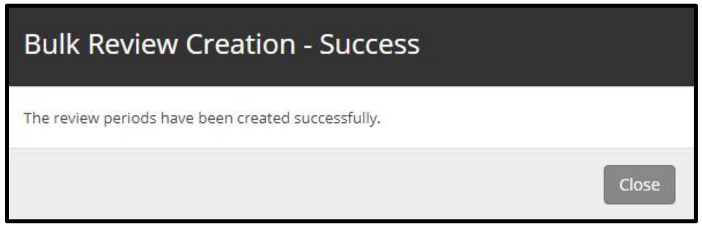
Notice there are six ways to filter the staff list down to a particular category of staff.

Practical task
1. Select **Department** then click in the text area where it says **Please select an option** 2. A dropdown list of departments (subjects) is displayed 3. Select a department with several staff in it 4. Tick the checkbox next to Staff Members to select all the staff in that department 5. Click the double arrows to move all selected staff from the left-hand side of the screen to the right-hand side



Practical task
1. Select the **Next** button 2. The final screen confirms the title, dates and selected staff for the bulk open of reviews 3. Check the information is as you requested then click the **Open Reviews** button

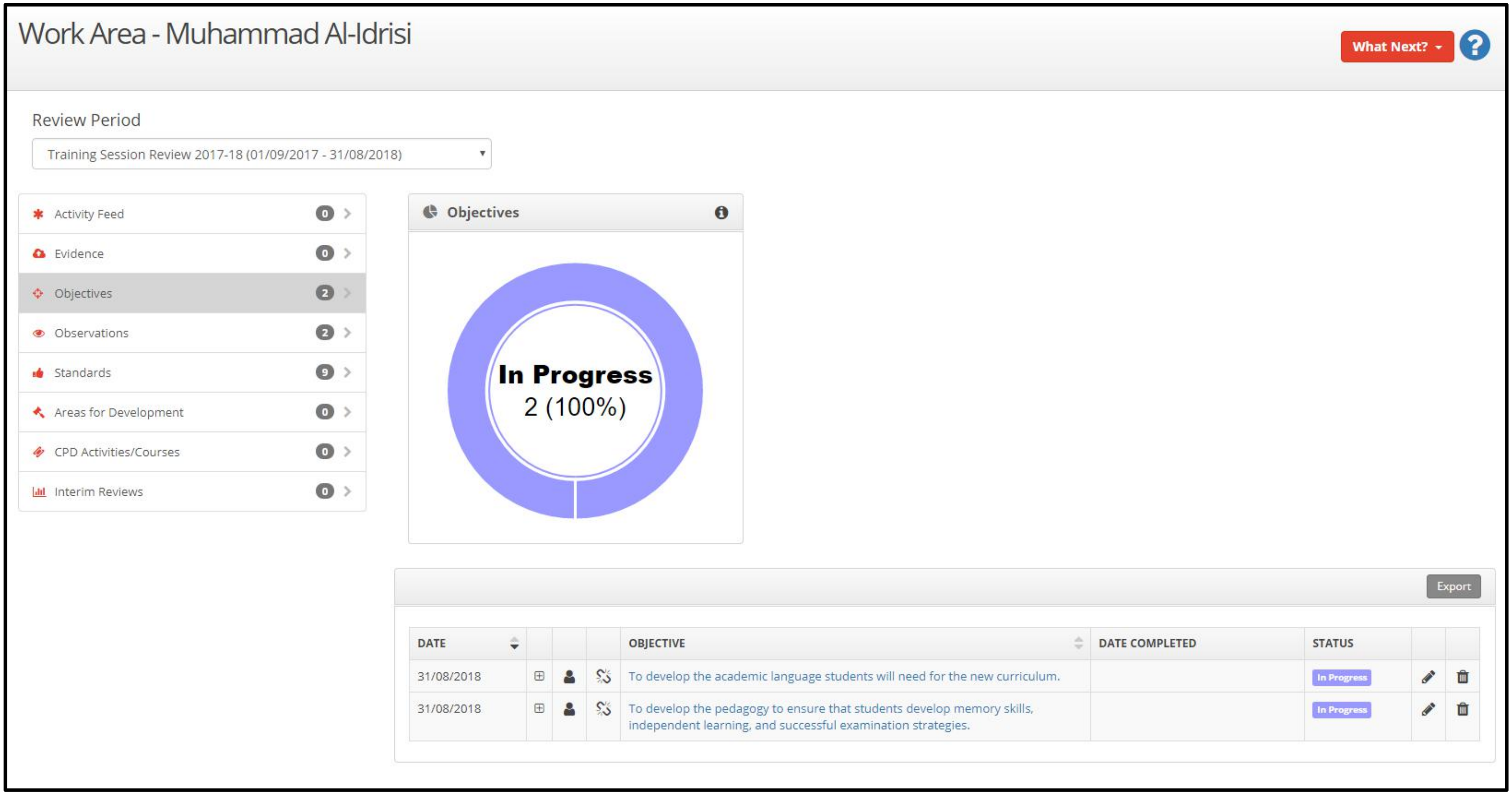
A confirmation message is displayed:



You can check one of the newly created reviews via the staff list.

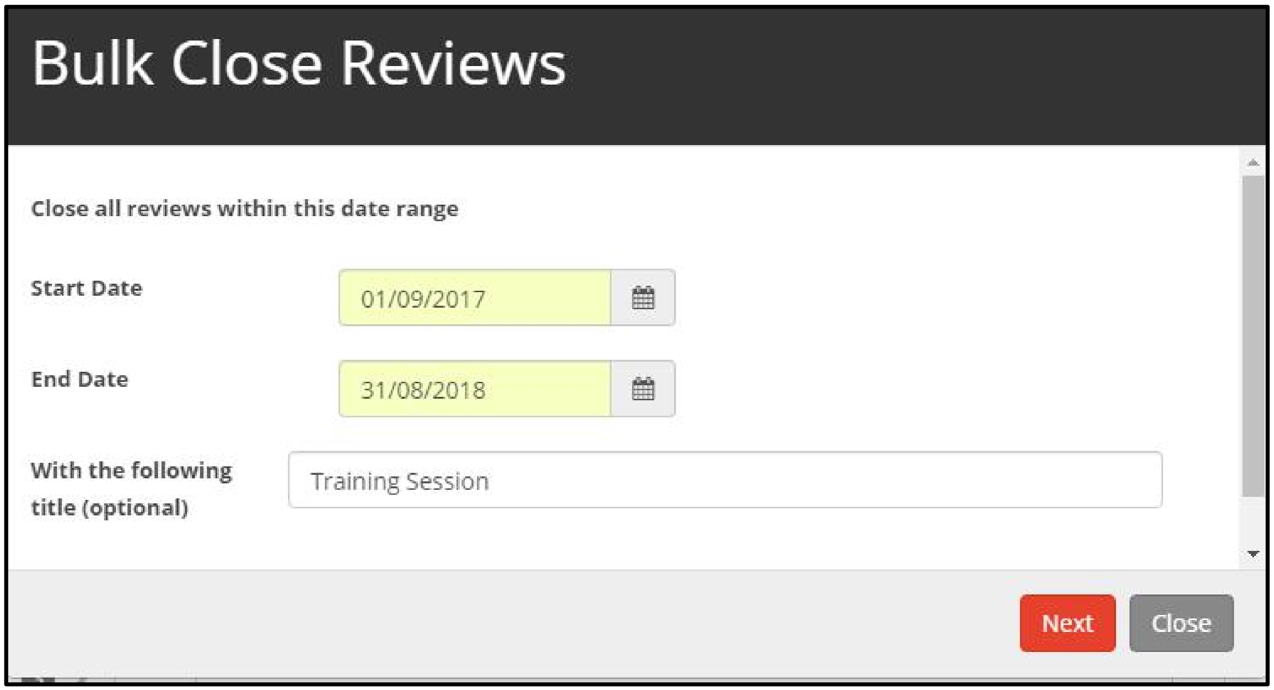
Practical task
1. Select **Home** from the left-hand contents menu 2. Select the **My Staff** tab 3. Select the **All Staff** radio button 4. Each staff member is listed at least once and more than once if they have more than one review covered by the date range 5. The review names are not displayed but the reviews you have just opened are likely to correspond to the last occurrence of the staff member's name 6. Click on the last occurrence of one of the staff you just opened a review for

The staff member's work area should open with the newly created review. If it is not the review you just created, check the other reviews in the dropdown list and find your new review. The standard objectives, standard observations and standards appropriate for the staff member type should display.



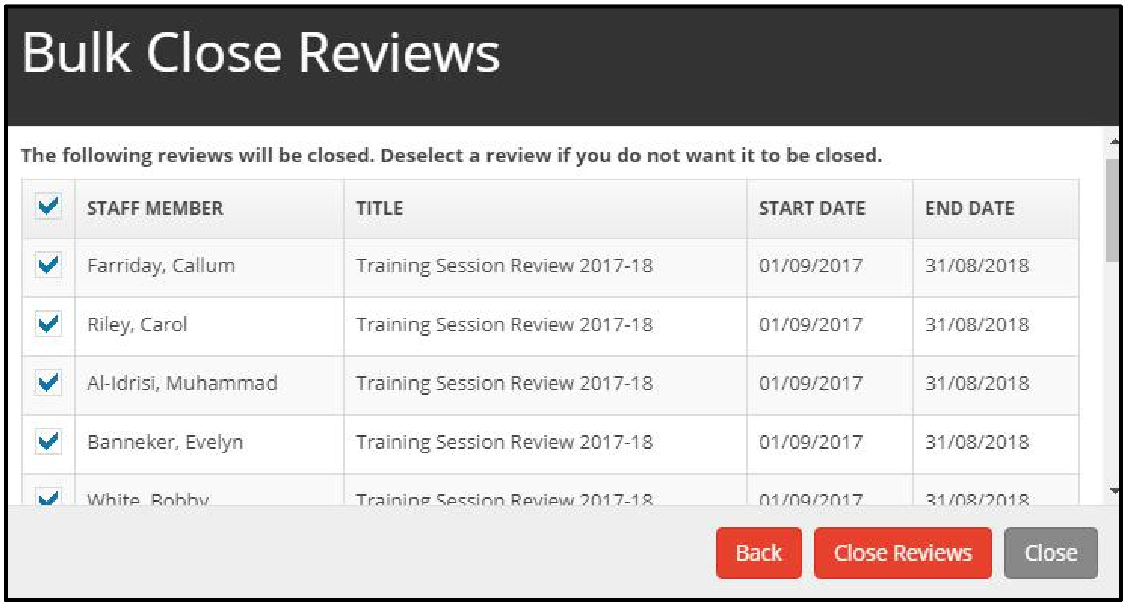
We shall now close all the reviews we have just opened.

Practical task
1. From the left-hand contents menu select **Settings** 2. From the **Performance Management** section select **General** in the dropdown list from the **Go** button 3. Select the **Bulk Actions** tab from the list of ten tabs on the left-hand side 4. Click the **Start** button within the **Close Reviews** area 5. The dates should be the academic year dates - enter part of the title of the new you wish to close



Practical task
1. Select the **Next** button

The next screen shows you a list of reviews to close with ticks defaulted to each one. You can check the list and remove ticks for any reviews that should not be closed.



Practical task
2. Select the **Close Reviews** button

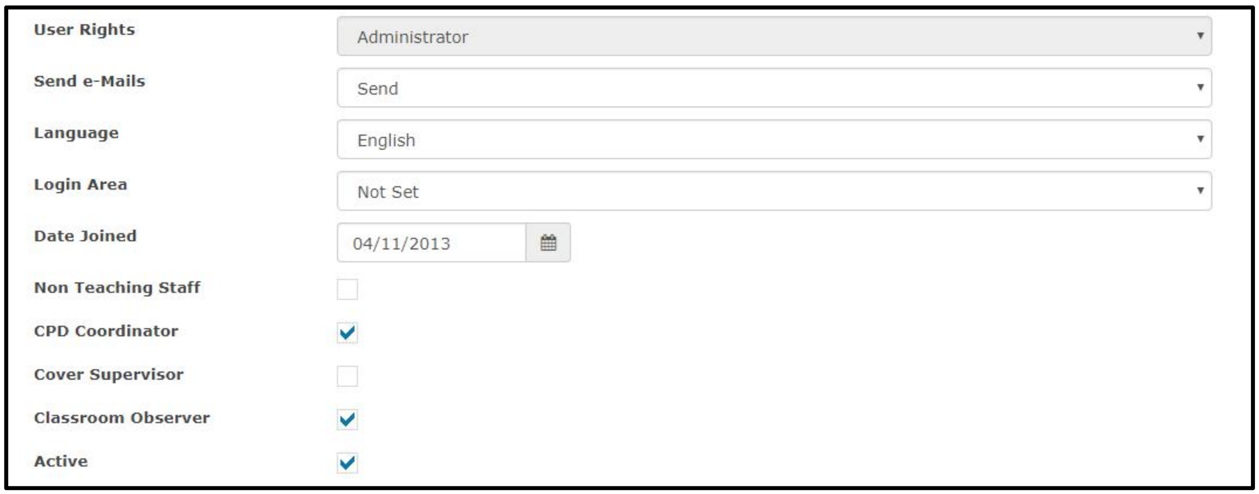
If you return to your full list of staff the flag icon on the extreme right of the screen should show ticks against staff members for completed reviews.

Practical task
1. Select **Home** from the left-hand contents menu 2. Select the **My Staff** tab 3. Select the **All Staff** radio button 4. Check the last occurrence of one of the staff you just opened then closed a review for - the right-hand column should show a tick to indicate a closed review. 5. Click on the staff member name to double-check the review is now closed

8 The roles of the CPD Coordinator and the Cover Supervisor

In Course One we saw how any ordinary staff member could request to go on a course. In Course Two we saw how a line manager could add a course and approve her staff to attend courses. In this section we look at the roles of the CPD Coordinator and the Cover Supervisor in ensuring staff are placed on suitable courses to assist their professional development.

Practical task
1. Select **Home** from the left-hand contents menu 2. Select the **My Staff** tab 3. Select the **All Staff** radio button 4. Click the pencil next to yourself and ensure you are ticked as a CPD Coordinator 5. Save your update if necessary



There are a number of user rights associated with the CPD Coordinator role. These are automatically set for the CPD Coordinator, but double-check they are ticked against the Administrator Standard User.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select the **Custom Lists** option from the **Go** dropdown in the **General Settings** area 3. Select the **Standard User Rights** tab 4. Click on the **Administrator** standard user 5. Ensure the **Performance Management** tab is selected 6. Scroll down to the **View Areas for Development** checkbox 7. Ensure this is ticked as well as the next four user rights relating to the CPD functionality

✓	View Areas for Development	Allows the user to view the Areas for Development section of their Work Area
✓	View CPD Activities/ Courses	Allows the user to view the CPD Activities/ Courses section of their Work Area
✓	• Add User Defined CPD	Allow the user to add their own User Defined CPD
✓	• View Course Costs	Allows the user to view the cost column against courses.
✓	• View Course Request Comments	Allows the user to see the comments against their course requests

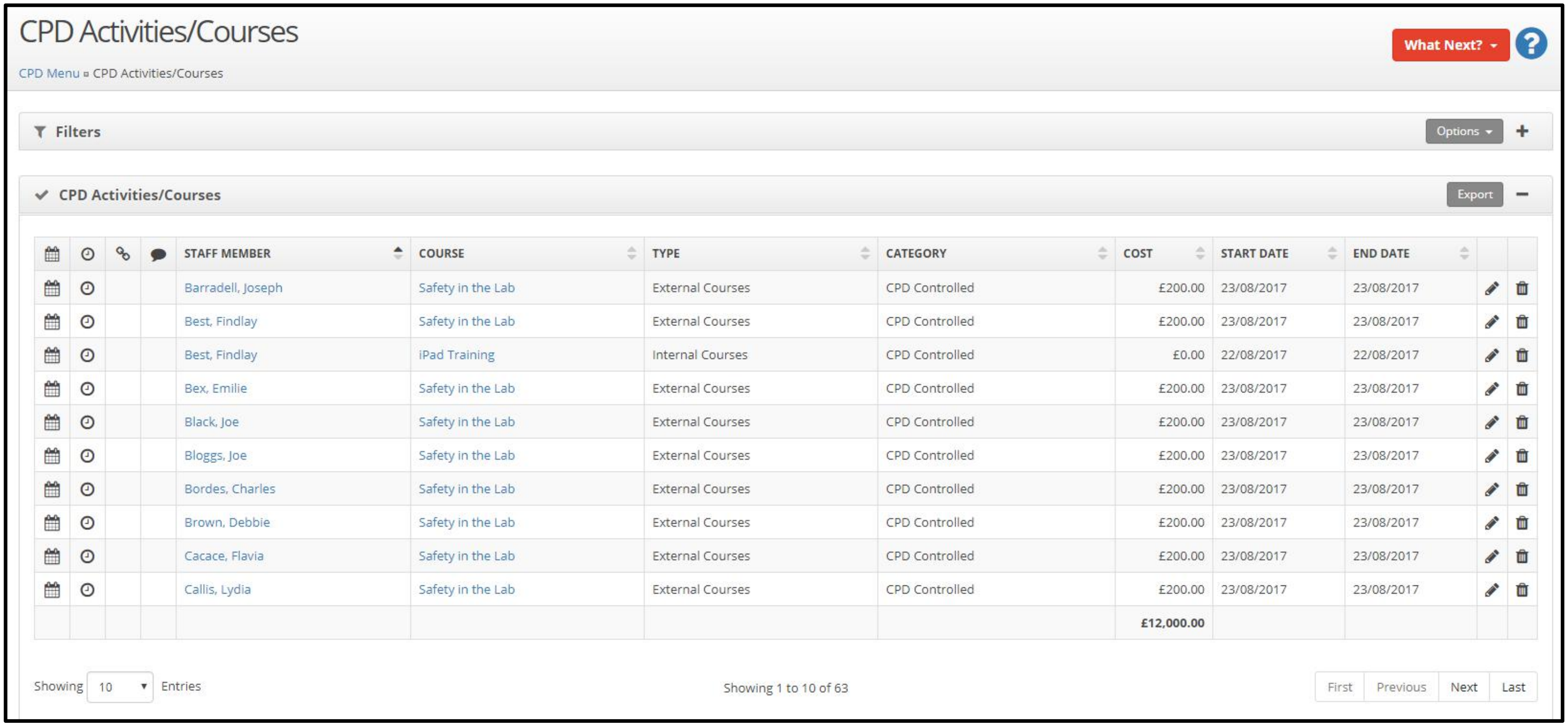
We shall be looking at an example where a request to go on a course requires approval by the person's line manager and the CPD coordinator and also the cover supervisor, so you need to set another staff member as a cover supervisor and be able to login as them.

Practical task
1. Select **Users and Groups** from the left-hand contents menu 2. Click the **Go** button within the **Staff Members** area 3. Click the pencil next to a staff member you are going to set to be a cover supervisor 4. Tick the **Cover Supervisor** checkbox 5. Select **Save** from the What Next? Dropdown to save your update

As a CPD Coordinator you have three pages available from the CPD dropdown in the contents menu area:

Practical task
1. Select the **CPD Activities/Courses** option from the **CPD dropdown**

The CPD Activities/Courses page lists all the courses in your current academic year.


CPD Activities/Courses

CPD Menu » CPD Activities/Courses

What Next?

Filters — Options

CPD Activities/Courses — Export

				STAFF MEMBER	COURSE	TYPE	CATEGORY	COST	START DATE	END DATE		
				Barradell, Joseph	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Best, Findlay	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Best, Findlay	iPad Training	Internal Courses	CPD Controlled	£0.00	22/08/2017	22/08/2017		
				Bex, Emilie	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Black, Joe	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Bloggs, Joe	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Bordes, Charles	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Brown, Debbie	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Cacace, Flavia	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
				Callis, Lydia	Safety in the Lab	External Courses	CPD Controlled	£200.00	23/08/2017	23/08/2017		
								£12,000.00				

Showing 10 Entries — Showing 1 to 10 of 63 — First Previous Next Last

You can use the filter options to filter the list to a different date range or to a category of your staff, or a type of course, or to an individual staff member.

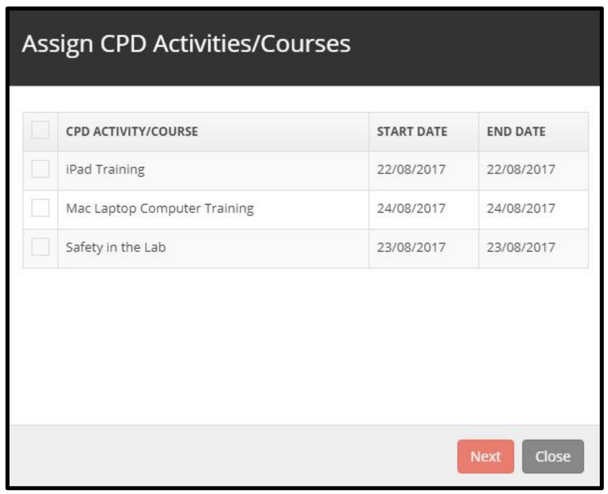
We shall now add a new course and assign it to several staff.

Practical task
1. Select **Add Course** from the What Next? button dropdown options 2. Add realistic data and click the **Add** button to add your new course

The course is not listed on the current page but we can now assign the course to staff.

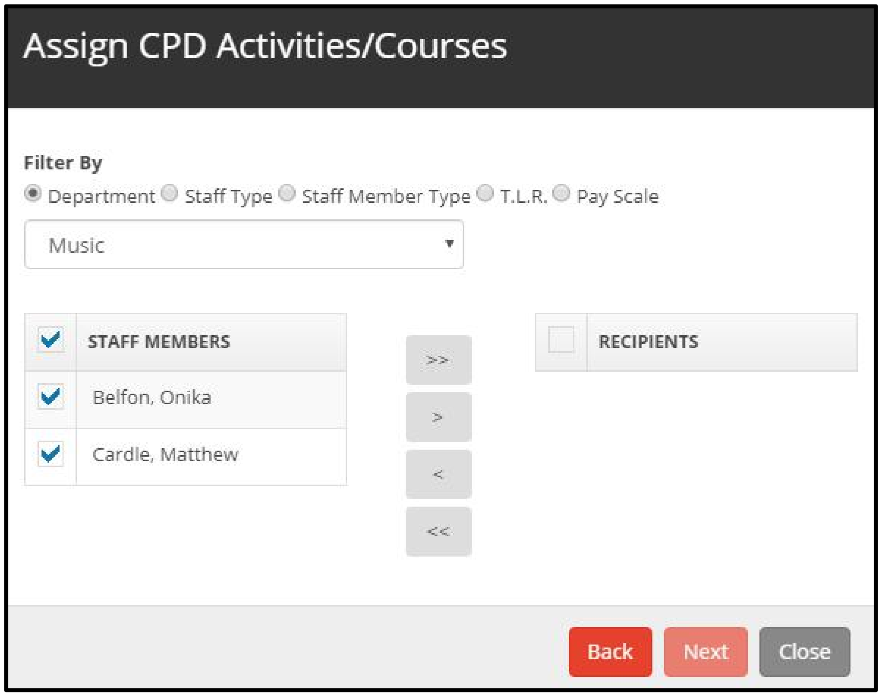
Practical task
1. Select **Assign Courses** from the What Next? button dropdown options

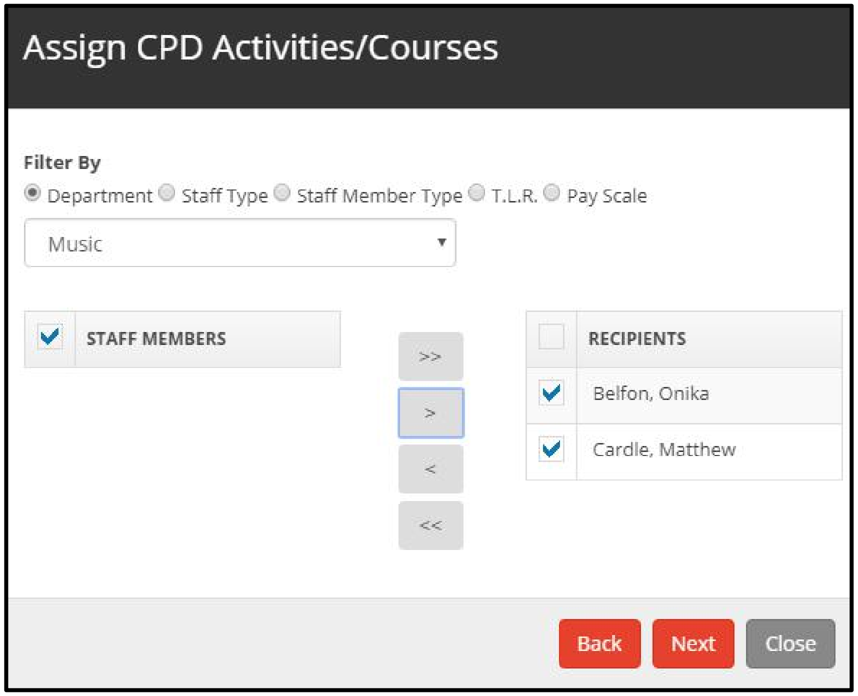
A popup window listing all courses in the current date range is shown. Your new course should be in the list.



Practical task
1. Tick your new course then click the **Next** button 2. Select a filter option, for example the Music Department 3. Check your staff list reduces from all to a small number 4. With several staff ticked, click the single arrow to move the staff to the Recipients side on the right

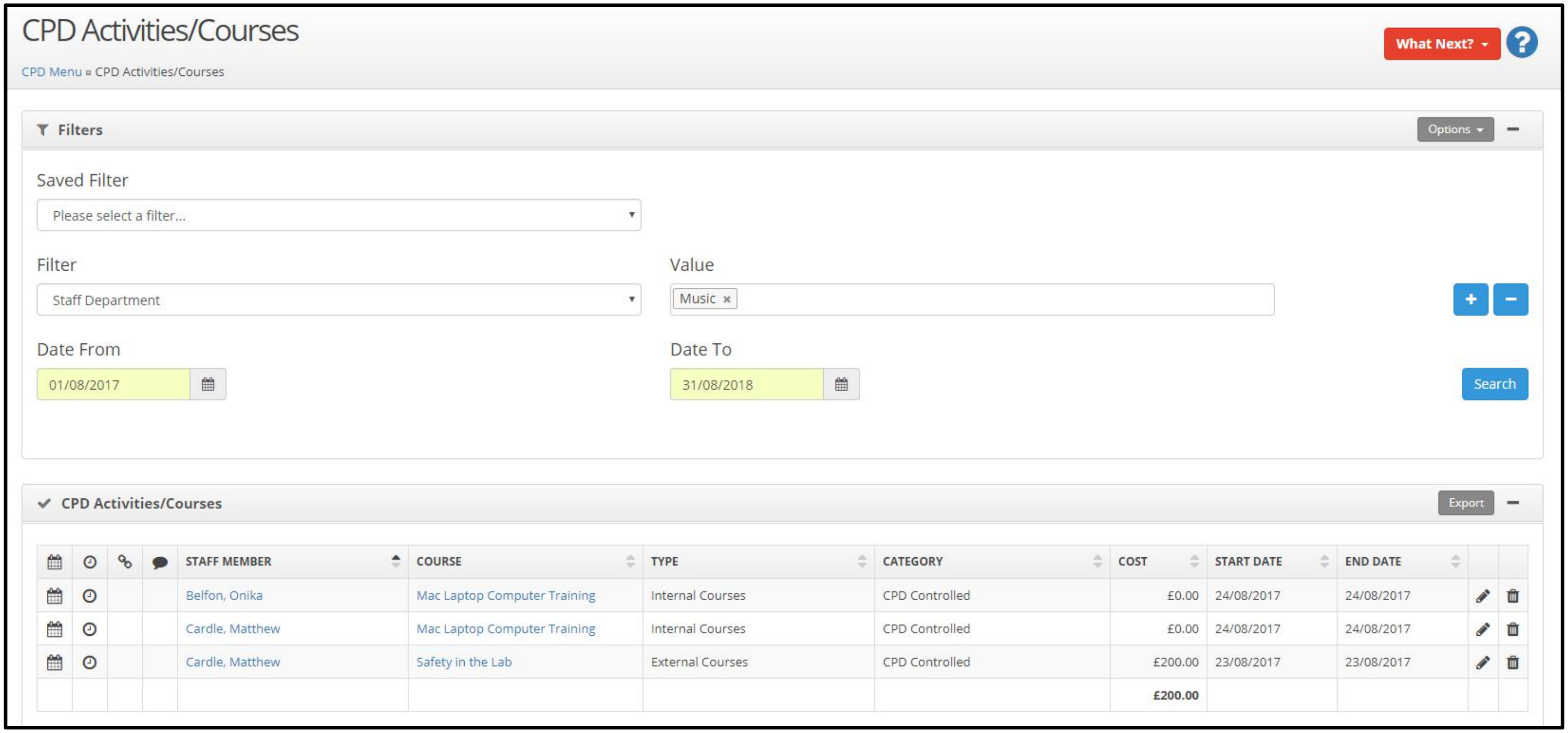
Your screen should change from one like the first one below to one like the second one:





Practical task
1. Click **Next** to move to the screen where a status of Planned, Attended or Not attended can be chosen - select **Planned** 2. Click **Next** 3. The final screen should confirm your course and the staff to be assigned - click **Assign**

You may not see the new course with the correct staff assigned straight away, but if you use the filtering options, you should be able to obtain the appropriated filtered list, like the one below:



We shall now look at the second button within the CPD section - CPD Requests. This page lists all CPD Requests within the date range which are either Pending, Approved or Rejected. Your screen should resemble this:

01/09/2016 | 31/08/2018 | Search

CPD Requests - Pending

Export

STAFF MEMBER	COURSE		PROVIDER	ADDRESS	REQUEST STATUS	REQUEST
Barlow, Claire	How to Challenge and Extend Able Learners		Osiris Educational	NOTTINGHAM		Pending
Barradell, Joseph	MCSE Course		Microsoft	ONLINE		Pending
Lodder, Rachel	SchooliP Training - Admin		Derventio Solutions Limited	ONSITE		Pending

CPD Requests - Approved

Export

STAFF MEMBER	COURSE		PROVIDER	ADDRESS	REQUEST STATUS
Brown, Debbie	Applying Phonics to Writing		Osiris Educational	Osiris Educational Raithby Hall Raithby SPILSBY	
Hodson, Charlotte	16-19 Accountability Measures 2016		Osiris Educational	London	
			Osiris Educational	London	
Jones, Sam	Assessment in Computing 2017		Osiris Educational	Osiris Educational Raithby Hall Raithby SPILSBY	
Lodder, Rachel	16-19 Accountability		Osiris Educational	LONDON	
Miles-Hayler, Claire	Assessment in Computing 2017		Osiris Educational	Osiris Educational Raithby Hall Raithby SPILSBY	

CPD Requests - Rejected

Export

STAFF MEMBER	COURSE		PROVIDER	ADDRESS	REQUEST STATUS
Barradell, Joseph	MCSE: Server Infrastructure		Microsoft	ONLINE	
Lodder, Rachel	How to Demonstrate Progress		Osiris Educational	Osiris Educational Raithby Hall Raithby SPILSBY	

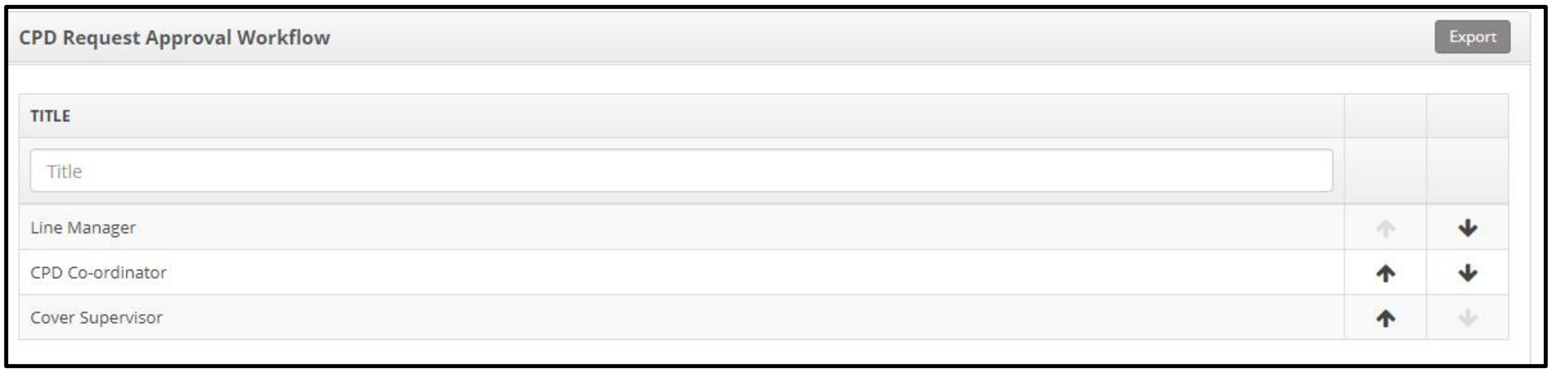
If you look at the Request Status columns you will see various coloured blocks. If you hover over them text will display with details of why they are the colour they are. You will notice green means approved, red means rejected and blue means pending.

If you look at those CPD Requests with three coloured blocks you will notice that first the Line Manager can approve them, then the CPD Coordinator can approve them, then finally the Cover Supervisor can approve them.

The approval procedure is set up in the Settings area of the system.

Practical task
1. Select **Settings** from the left-hand contents menu 2. Select the **Go** button in the **Performance Management** area 3. Select the **CPD** option in the dropdown list 4. Select the **CPD Approval Workflow** tab

The screen show be like this:



The screen shows the Line Manager is the first person to approve or reject a CPD request from one of their staff. If they approve, then the CPD request goes to the CPD Coordinator to approve or reject. Finally, if the course request require cover for the person going on the course, the Cover Supervisor must approve or reject the course.

To see the whole process working in this Training Session you would need four logins:

- The ordinary staff member logs in and puts in a CPD Request to go on a course which will require cover
- The line manager of the staff member logs in and sees the CPD Request on their CPD Requests page with status Pending.
- The CPD Coordinator logs in and sees the CPD Request on their CPD Requests page with status Pending (assuming the line manager approved it)
- The Cover Supervisor logs in and sees the CPD Request on their CPD Requests page with status Pending (assuming the CPD Coordinator approved it)

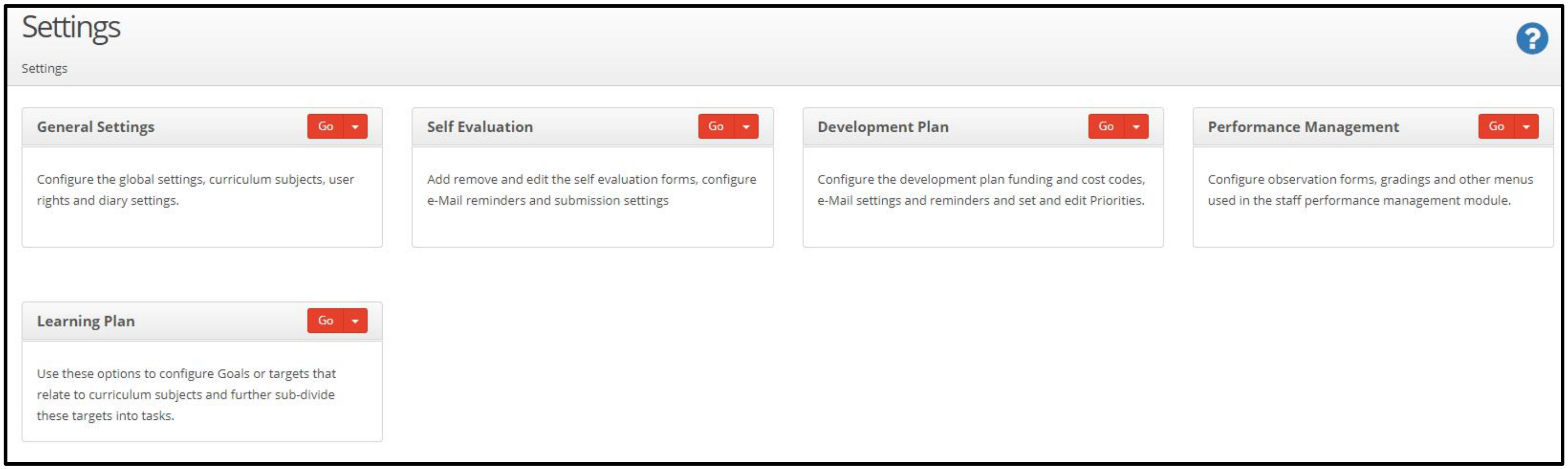
If the Cover Supervisor approves the CPD request, the original staff member will be notified.

Practical task
1. If you have the login credentials for the four login users required, follow the process described above through from initial CPD request to approval by the Cover Supervisor

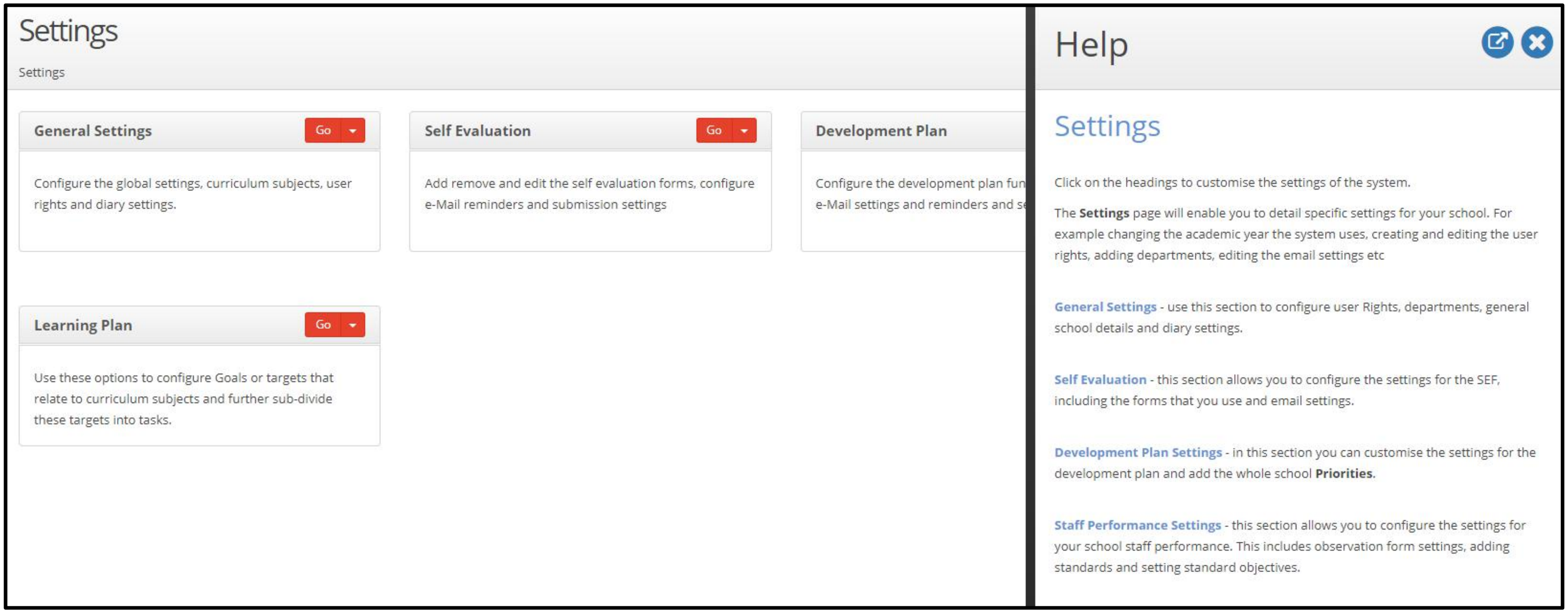
9 Functionality not covered in the Training Manuals

Not every item of functionality has been covered in the three training manuals. In particular there is a large number of settings, accessible from the Settings contents menu item which have not been covered. However every aspect of the functionality and descriptions of the actions of all the settings is available from the online help within the system.

Each page has a white question mark on a blue background circle in the top-right corner of the main screen. If you select that button you should gain access to help advice regarding the functionality of the page you are currently on.



Clicking the question mark icon opens up a help screen on the right-hand side of the main screen:



Notice the help area has two icons in the top-right corner:

- The window with arrow icon is used to open the Help in a new window
- The cross icon is used to close the Help panel
- Some of the items in the Help panel are hyperlinked for you to open other Help pages

You also have two Help pages accessible from the left-hand contents menu if you expand the **Help** item:

- The **Support Centre** button accesses a page with lists of common questions divided into categories as well as the recent Release Notes for new versions of the software and user guides for MIS and Active Directory functionality
- The **Help Videos** button accesses a page where a number of videos can be watched by clicking the play icon within the video or the **View Video** button

10 Summary of the training session

In this training course, you have learnt how to:

- Add new staff if your system is a standalone system
- Distinguish between a standalone system and one using Active Directory and one connected to an MIS
- Update staff details from the Edit Staff Member pages
- Update staff details from the Staff Management screen
- Access and update the Standard Users Rights pages
- Alter individual staff user rights
- Use staff member types to link staff to appropriate objectives, observations and standards so the correct defaults display in their new reviews
- Add question headers, questions and footer information into an observation form
- Create observation questions of differing types
- Set staff as collaborators and set default actions for collaborators
- Change the academic year
- Bulk open reviews
- Bulk close reviews
- Add and assign CPD Courses and Activities
- Understand the process whereby CPD Requests can obtain approval
- Use the online help pages to find advice regarding functionality not covered in the three training manuals

If you have any queries, please do not hesitate to contact support@derventioeducation.com or call 0333 0433 450.

You are encouraged to take advantage of the various help items accessible from the **Help** contents item from within the system.

You can also access **Live Chat** from the contents menu. The Live Chat application is available to answer your questions promptly between 8:30 and 17:00 on business days throughout the year.