iObservation®
a division of Learning Sciences International
ADVANCING PROFESSIONAL GROWTH

HOW TO USE iOBSERVATION TO COLLABORATE WITH ADMINISTRATORS AND COLLEAGUES

Create your own learning communities within the system to enhance face-to-face conversations conveniently online. iObservation facilitates the following types of conferring.

TYPE OF COLLABORATING	USE
Pre/Post Conferences	Questionnaires outline the Pre and Post Conference process. They are preset lists of questions for teachers and administrators to preview, reflect, respond to and discuss. Either a teacher or an administrator may start a questionnaire.
Conferences	Conferences are **private conversations** between you and one other user in the system. No third person will be able view to your conferences. It allows professional dialogue to begin or continue before a face-to-face meeting can be scheduled. Conferences can be used between observers and teachers to talk about feedback after walkthroughs/observations; between peers to support each other; and between coaches and teachers or between colleagues in a mentorship capacity.
Discussions	Discussions provide a **forum for group discussions** within the system. They may be open to the entire district or school, or restricted to members within a department, team, grade level. Discussions may be used by group members to collaborate together, talk about their professional development experiences, share best practices and challenges, among other topics. Discussions provide a virtual learning community for educators to collaborate and grow together.

Training packet contains the following:

- **How to Create a Pre/Post Conference**
- **How to Create a Conference**
- **How to Create a Discussion**

Quick Start Guide: Pre/Post Conferences

A. Start a Pre-Conference

1. Hover over **Collaborate**.
2. Click **Pre/Post Conferences**.
3. Click the **Create New Pre/Post Conference** button.
4. Select a Questionnaire from the drop down menu.
5. Choose the **To Be Completed By**, either, “I’m creating this questionnaire for someone else to complete.” or “I’m creating this questionnaire for myself to complete.”
6. **Locate** the participant’s name in the list.
7. *Optional:* You may page or search to find the name in the list.
8. Click **Add** to select the participant.
9. Click **Next**.
10. If you are completing the questionnaire, type or choose a response to the first question.
11. *Optional:* Repeat step 10 for additional questions.

See Finish a Pre-Conference for steps on how to finish the questionnaire.

B. Edit a Pre-Conference

1. Hover over **Collaborate**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre-Conference in the list.
4. *Optional:* You may reorder or search to find the Pre-Conference in the list.
5. Click **Continue**.
6. Type or choose a response to a question.
7. *Optional:* Repeat step 6 for additional questions.

See Finish a Pre-Conference for steps on how to finish the questionnaire.

C. Finish a Pre-Conference

1. Hover over **Collaborate**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre Conference in the list.
4. *Optional:* You may reorder or search to find the Pre-Conference in the list.
5. Click **Continue**.
6. *Optional:* Type or choose a response to a question.
7. *Optional:* Repeat step 6 for additional questions.
8. *Optional:* Type additional comments in the Overall Comments text area.
9. Click **Finish**.
10. Click **Yes**.

D. Start a Post Conference

See Start a Pre-Conference

E. Edit a Post Conference

See Edit a Pre-Conference

F. Finish a Post Conference

See Finish a Pre-Conference

G. Conduct an Observation with Imported Evidences

Note: This functionality is dependent upon the form assigned. Some forms do not include import evidence functionality.

1. Hover over **Observations**.
2. Click **Conduct**.
3. **Locate** the learner's name in the list.
4. *Optional:* You may reorder or search to find the name in the list.
5. Click the **Forms** button.
6. Select a **Form** from the drop down menu.
7. *Optional:* Set a default form by clicking Select Default Form and choosing a form from the drop down menu.
8. *Optional:* Once the default is set, skip steps 5-6 by clicking Begin.
9. The **Table of Contents** appears.
10. *Optional:* Change the learner's location using the drop down menu. If the learner is in only one building, the observer does not need to make a selection.

11. *Optional:* Select the button to indicate that the observation is formal, informal or a walkthrough.
12. *Optional:* Check the checkbox to indicate if the observation "Counts towards Annual Evaluation".
13. Click the **Add Pre/Post Conferences** link.
14. Click the **Select** link to select one or more Pre or Post Conferences.
15. Click **Close**.
16. Click a look-for in the list to begin collecting data.
17. Add data to the form by typing comments, adding information, etc.
18. Add evidences to the form by clicking the **Add** link.
19. Click the **Select** link to select one or more notes or questionnaire responses to include.
20. Click **Close**.
21. *Optional:* Repeat steps 18-19 to add additional questionnaire responses.
22. *Optional:* Add more look-fors by repeating steps 16-21 by either clicking Back to Table of Contents or opening the Form Map.
23. *Optional:* Click Cancel to exit the observation without saving.
24. *Optional:* Click Save and Close to save a draft of the form then return to the Conduct list view.
25. *Optional:* Click Save Draft to save the observation and edit at another time.
26. *Optional:* Send a notification email to the learner.
27. *Optional:* Type and additional message.
28. Click **Finish** to end the observation. Completed observations are not editable.

H. Continue a Saved Draft Observation

See Observation Quick Start Guide

I. Delete a Saved Draft

See Observation Quick Start Guide.

J. View Completed Observation

See Observation Quick Start Guide.

K. Share a Pre/Post Conference

Note: Sharing is an optional feature in iObservation.

1. Hover over **Collaborate**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre/Post Conference in the list.
4. *Optional:* You may reorder or search to find the Pre/Post Conference in the list.
5. Click **Share**.

6. Choose between:
    a. Share with Learner/Requestor (user's name will be displayed)
    b. Share with others
7. If share with Learner/Requestor is selected, sharing is complete.
8. If, share with others is selected, click **Add** to select one or more users from the list.
9. *Optional:* You may search or page to find the user in the list.
10. Click **Save**.

L. Remove Sharing from a Pre/Post Conference

1. Hover over **Collaborate**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre/Post Conference in the list.
4. *Optional:* You may reorder or search to find the Pre/Post Conference in the list.
5. Click **Share**.
6. Choose between:
    a. Un-share with Learner/Requestor (user's name will be displayed)
    b. Share with others
7. If un-share with Learner/Requestor is selected, sharing removal is complete.
8. If, share with others is selected, click **Remove** to eliminate one or more users from the shared users list.
9. Click **Save**.

M. View a Shared Conference

Note: Shared conferences will have a **Shared** indicator in the list view.

1. Hover over **Collaborate**.
2. Click **Conferences**.
3. **Locate** the Conference in the list.
4. *Optional:* You may reorder or search to find the Conference in the list.
5. Click **View**.

Technical Training

Virtual technical training sessions are available. During the 45 minutes session an experienced technical trainer will spend one-on-one time with individual users around using iObservation features. Contact us at iObform@iObservation.com to learn more or purchase sessions.

Conferences are private conversations between you and one other user in the system. It allows professional dialogue to begin or continue before a face-to-face meeting can be scheduled. Conferences can be used between observers and teachers to talk about feedback after walkthroughs/observations; between peers to support each other; and between coaches and teachers or between colleagues in a mentorship capacity.

A. Start a New Conference

1. Hover over the **Collaborate** tab.
2. Click **Conferences** in the sub-menu.
3. Click **Create New Conference** button at the top of the list.
4. Type the user's name in the **Conference with** box to search. Results will appear to the right.
5. Click **Select** to add the user to the conference.
6. Type a **Title** for the conference**.**
7. Type your first post in the **First Post** text box.
8. *Optional:* Click Add from Resource Library to select a resource. Repeat to add additional resources.
9. *Optional:* Click Browse/Choose File to select a file. Click Add Attachment to add additional files.
10. *Optional:* Check the checkbox to Send notification email to the other user in the conference.
11. *Optional:* Type an Additional message in notification email.
12. Click **Next**.
13. The **Conference** page with your first post displays.

B. View a Conference

Note: You may only view conferences that you started or were invited to by another user.

1. Hover over the **Collaborate** tab.
2. Click **Conferences** in the sub-menu.
3. The **Conferences** list appears with all of your existing conferences.
4. *Optional:* You may sort, reorder, or search to find your conference.
5. Click the **View** button.
6. The **Conference** page with your conference post(s) displays.

C. Respond to a Conference

1. Hover over the **Collaborate** tab.
2. Click **Conferences** in the sub-menu.
3. The **Conferences** list appears with all of your existing conferences.
4. *Optional:* You may sort, reorder, search or use the pager to find your conference.
5. Click the **View** button.
6. The **Conference** page with your conference post(s) displays.
7. Click **Create New Post** button.
8. Type your **Post Message** in the text box.
9. *Optional:* Click Add from Resource Library to select a resource. Repeat to add additional resources.
10. *Optional:* Click Browse/Choose File to select a file. Click Add Attachment to add additional files.
11. Click **Post.**

D. Share a Conference

Note: Sharing is an optional feature in iObservation.

1. Hover over **Collaborate**.
2. Click **Conferences**.
3. **Locate** the Conference in the list.
4. *Optional:* You may reorder or search to find the Conference in the list.
5. Click **Share**.
6. Click **Add** to select one or more users from the list.
7. *Optional:* You may search or page to find the user in the list.
8. Click **Save**.

E. Remove Sharing from a Conference

1. Hover over **Collaborate**.
2. Click **Conferences**.
3. **Locate** the Conference in the list.
4. *Optional:* You may reorder or search to find the Conference in the list.
5. Click **Share**.
6. Click **Remove** to eliminate one or more users from the shared users list.
7. Click **Save**.

F. View a Shared Conference

Note: Shared conferences will have a **Shared** indicator in the list view.

1. Hover over **Collaborate**.
2. Click **Conferences**.
3. **Locate** the Conference in the list.
4. *Optional:* You may reorder or search to find the Conference in the list.
5. Click **View**.

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A. Create a New Discussion

Note: Only the creator of the discussion or an Administrator can edit, close, delete the discussion or delete a discussion post. If you are unable to see a discussion thread, contact your Administrator.

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. Click **Create New Discussion** button at the top of the list.
4. Click **Select** to add individual users or an entire organization of users from the list.
5. Optional: Type the user's name or organization in the search box. Results appear to the right.
6. Type a Discussion **Title.**
7. Type your first post in the **First Post** text box.
8. *Optional:* Click Add from Resource Library to select a resource. Repeat to add additional resources.
9. *Optional:* Click Browse/Choose File to select a file. Click Add Attachment to add additional files.
10. *Optional:* Check the checkbox to Send notification email to the members in the discussion.
11. *Optional:* Type an Additional message in notification email.
12. Click **Next**.
13. The **Discussion** page with your first post displays.

B. View Discussion

Note: You may only view discussion threads that you created or that you were invited to by another user. If you are unable to see a discussion thread, contact your Administrator.

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. The **Discussions** list appears with all of your existing discussion threads.
4. *Optional:* You may sort, reorder, or search to find your discussion thread.
5. Click the **View** button.
6. The **Discussion** page with discussion post(s) displays.

C. Respond to a Discussion

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. The **Discussions** list appears with all of your existing discussions.
4. *Optional:* You may sort, reorder, search or use the pager to find your discussion.
5. Click the **View** button.
6. Click **Create New Post** button.
7. Type your **Post Message** in the text box.
8. *Optional:* Click Add from Resource Library to select a resource. Repeat to add additional resources.
9. *Optional:* Click Browse/Choose File to select a file. Click Add Attachment to add additional files.
10. Click **Post.**

D. Delete a Post from a Discussion

Note: Only the discussion creator or an Administrator can delete discussion posts. If you are unable to delete a post, contact your Administrator.

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. The **Discussions** list appears with all of the existing discussion threads.
4. *Optional:* You may sort, reorder, search or use the pager to find the discussion thread.
5. Click the **View** button.
6. The **Discussion** page with discussion post(s) displays.
7. *Optional:* You may sort, reorder, or use the pager to find the discussion post.
8. Click the **Delete** link at the top right of the post. Deleting a post cannot be undone.

E. Edit a Discussion

Note: Only the discussion creator or an Administrator can edit discussion threads. If you are unable to see or edit a thread, contact your District or School Administrator.

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. The **Discussions** list appears with all of your existing discussion threads.
4. *Optional:* You may sort, reorder, search or use the pager to find your discussion thread.
5. Click the **Edit** button.
6. The **Edit Discussion** page appears with the current discussion thread configuration.
7. *Optional:* Click the Select or Remove links to add or remove a user or organization.
8. *Optional:* Edit the Discussion Title.
9. *Optional:* Check the checkbox to Send notification email to removed members.
10. *Optional:* Check the checkbox to Send notification email to members.
11. *Optional:* Select to Send notification email to all members or to new members only.

Edit a Discussion (continued)

12. *Optional:* Type an Additional message in notification email.
13. Click **Next**.
14. The **Discussion** page with discussion updates and post(s) displays.

F. Close a Discussion

Note: Only the discussion creator or an Administrator can close or reopen a discussion thread. If you are unable to see a thread, contact your Administrator.

1. Hover over the **Collaborate** tab.
2. Click **Discussions** in the sub-menu.
3. The **Discussions** list appears with all of your existing discussion threads.
4. *Optional:* You may sort, reorder, search or use the pager to find your discussion thread.
5. Click the **Close** button. Closed discussions can be viewed by users who were part of the discussion but additional posts cannot be made to the closed discussion thread.
6. *Optional:* You may reopen the discussion. Click the Reopen button to open the discussion to other users again.

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