iObservation®
a division of Learning Sciences International
ADVANCING PROFESSIONAL GROWTH

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.