

### A. Conduct an Observation

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. Click a look-for in the list to begin collecting data.
11. *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.
12. Add data to the form by typing comments, adding information, etc.
13. *Optional:* Add more look-fors by repeating steps 10-11 by either clicking Back to Table of Contents or opening the Form Map.
14. *Optional:* Click Cancel to exit the observation without saving.
15. *Optional:* Click Save and Close to save a draft of the form then return to the Conduct list view.
16. *Optional:* Click Save Draft to save the observation and edit at another time.
17. *Optional:* Send a notification email to the learner.
18. *Optional:* Type an additional message.
19. Click **Finish** to end the observation. Completed observations are not editable.

### B. Conduct an Observation Using Offline Functionality

1. Start an observation (See **Conduct an Observation** above.)
2. When the table of contents displays you are safe to **disconnect** from the internet.
3. Conduct the observation as usual.
4. The Save and Close and Finish buttons will be *disabled*.
  - a. When offline, *only* Cancel and Save Draft are available.
  - b. Save Draft will be as usual.
5. **Reconnect** to the internet.
6. The system will 'sync' offline observation data.
7. Click **Save and Close OR Finish**.

### C. Conduct a Peer Observation

See **Conduct an Observation**.

## **D. Self-Observation**

1. Hover over **Observations**.
2. Click **Conduct**.
3. **Locate** your name in the list.
4. *Optional:* You may reorder or search to find your 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. Click a look-for in the list to begin collecting data.
11. *Optional:* Change your location using the drop down menu. If you are in only one building, you do not need to make a selection.
12. Add data to the form by typing comments, adding information, etc.
13. *Optional:* Add more look-fors by repeating steps 10-11 by either clicking Back to Table of Contents or opening the Form Map.
14. *Optional:* Click Cancel to exit the observation without saving.
15. *Optional:* Click Save and Close to save a draft of the form then return to the Conduct list view.
16. *Optional:* Click Save Draft to save the observation to edit at another time.
17. Click **Finish** to end the observation. Completed self-observations are not editable.

## **E. Self-Assessment**

See **Self-Observation**.

## **F. Continue a Saved Draft Observation**

1. Hover over **Observations**.
2. Click **Saved Drafts**.
3. **Locate** the Saved Draft observation in the list.
4. *Optional:* You may reorder or search to find the Saved Draft in the list.
5. Click the **Continue** button.

### G. Delete a Saved Draft

1. Hover over **Observations**.
2. Click **Saved Drafts**.
3. **Locate** the Saved Draft observation in the list.
4. *Optional:* You may reorder or search to find your completed observation in the list.
5. Click the **Delete** button. Deleting a draft cannot be undone.
6. Click **Yes** in the popup to confirm the deletion.

Completed Observation Type	Viewing Permissions
<b>Self</b>	Private to the Learner
<b>Peer</b>	Private to the Learner and Observer
<b>Standard Observation</b>	Learner, Observer, Administrator

Note: Results of Self Observations remain confidential to the learner until the Share option is utilized. At that point, the user that the observation is shared with, has read-only access to the observation. Results of Peer Observation remain confidential between the peer observer and peer learner until the Share option is utilized. At that point, the user that the observation is share with, has read-only access to the observation.

### H. Completed Observations

1. Hover over **Observations**.
2. Click **View Completed**.
3. **Locate** the Completed Observation in the list.
4. *Optional:* You may reorder or search to find the Completed Observation in the list.
5. Click the **View** button.
6. *Optional:* Click Print.
7. *Optional:* Click Show Entire Form to view all look-fors.
8. Click **Back to Completed Observations** to exit.

### I. View Feedback

See **View Completed Observation**.

### J. Form Preview

1. Hover over **Observations**.
2. Click **Preview Forms**.
3. **Locate** the form in the list.
4. *Optional:* You may reorder or search to find the form in the list.
5. Click the **Preview** button.
6. *Optional:* Click **Print**.
7. Click **Back to Forms** to exit.

### K. Viewing Users that are Assigned to a Form

Note: Only Administrators have privileges to view users that are assigned to a form.

1. Hover over **Observations**.
2. Click **Preview Forms**.
3. **Locate** the form in the list.
4. *Optional:* You may reorder or search to find the form in the list.
5. Click the **Assign to Users** button.
6. The list of assigned users displays.

### L. Assigning a Form to a User

Note: Only Administrators have privileges to assign forms to users.

1. Hover over **Observations**.
2. Click **Preview Forms**.
3. **Locate** the form in the list.
4. *Optional:* You may reorder or search to find the form in the list.
5. Click the **Assign to Users** button.
6. **Locate** the user's name in the list.
7. *Optional:* You may search to find the user(s) in the list.
8. *Optional:* You may click Select link next to an organization or building name to assign the form to all users in that organization or building.
9. Click the **Select** link.
10. Click **Save**.

### M. Un-assign a Form from a User

Note: Only Administrators have privileges to remove forms from users.

1. Hover over **Observations**.
2. Click **Preview Forms**.
3. **Locate** the form in the list.
4. *Optional:* You may reorder or search to find the form in the list.
5. Click the **Assign Users** button.
6. **Locate** the user's name in the list.
7. *Optional:* You may reorder or search to find the user(s) in the list.
8. *Optional:* You may click the Remove link next to an organization or building name to remove the form from all users in that organization or building.
9. Click the **Remove** link.
10. Click **Save**.

### 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](mailto:iObform@iObservation.com) to learn more or purchase sessions.