



Creating Views

What is a "View"?

A view allows the user to organize and order multiple forms into categories that will define their evaluation processes. Views also assist by accurately reporting on year end data, allowing users to filter not only by form type, but also in accordance to how the form was used in the evaluation process.

In the example (Fig. 1) below for a school leader, 4 views are being used which include Teacher Walkthroughs, Principal Walkthroughs, Peer evaluations and Health and Safety observations. Each view has a unique type of form whereby the Teacher

Walkthroughs will always identify whom the teacher being observed is, the Principal Walkthroughs will always identify who the school Principal or assistant principal is, the Teacher Evaluations will be forms used by teachers to observe other teachers, and the Health and Safety observations will not be identifying any staff, but will identify locations in the building.



Figure 1 - a typical school administrator view

Each view has one or more categories as illustrated by the categories for the Teacher Walkthroughs view (Fig. 2). In this example, there are 3 different kinds of templates which begin with self-assessments filled in by the teachers, the Informal Observations of teachers, and the Summative framework that the school uses for evaluations.



Figure 2 - categories for the Teacher Walkthrough view

Each category has its own criteria which control who can do what with a template. Whereas the Pre-Observation Self Assessment forms cannot be created by observers, Summative forms can only be created by administrators and principals but not teachers. In all 3 categories however, administrators and principals have permission to view the contents of the observations.

Views can be shared with individuals or sites, and it is this customizable control of who gets templates and can do what can be done with them that makes views so useful.

Building a View

To begin creating a view and its categories you select 'Build' and 'Views' (Fig. 3) which is located at the upper right corner of your screen (Fig 1).



This will bring you to the Template Builder screen with the 'Views' tab pre-selected and it will list all the views you may have created, how many walkthroughs have been done using each view, the type of 'subject' (teacher, principal, student, none) the templates in the view are for. You will also find here, the icon that will allow you to share your views with specific individuals, specific schools (sites) or your entire district if your account is at the district level (Fig. 4)

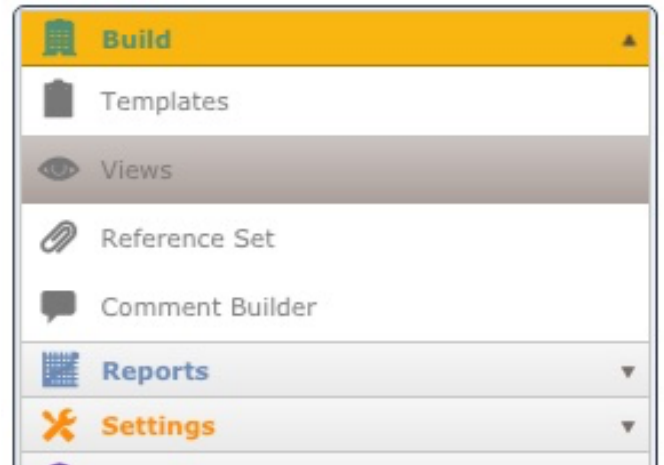


Figure 3 - selecting the Build Views function

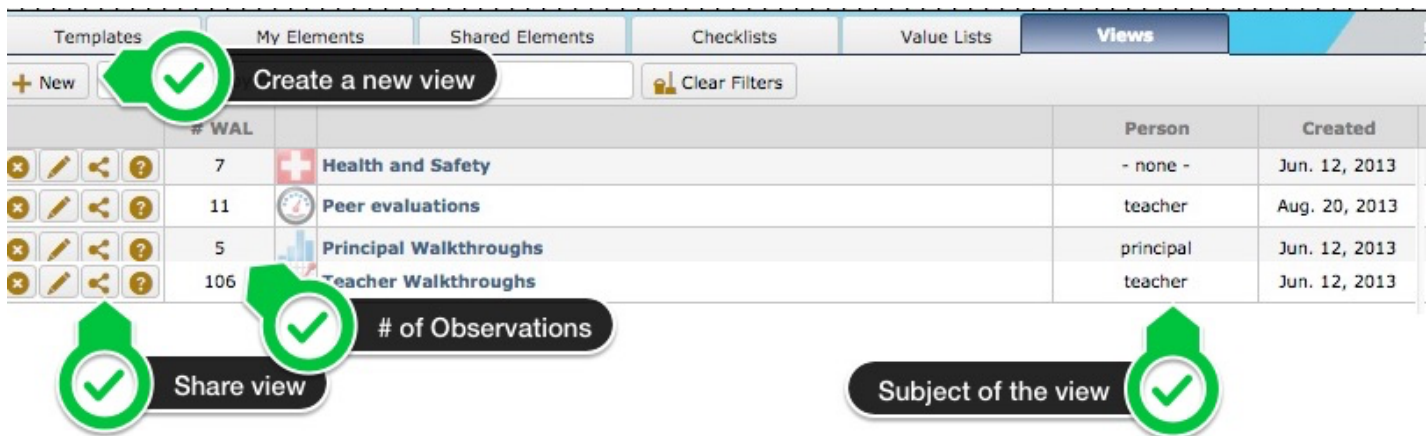


Figure 4 - the Views window

Of course if this is your first time at creating a view, there will not be any views listed unless there are views that have been shared with you.

To begin creating a View, select **+New**. This will ask for a name for the view, allow you to copy an existing view for which you have permission, and stipulate who (if anyone) will be observed in this view (Fig. 5). Once you have entered this information you are taken to the screen for building your view and its categories (Fig 6). Here you can select an image for your view (Fig. 1) an icon for the listing of your view (Fig. 4), and as an option you can even select a link that you would goto when you click on the image. Linking an image is not done very frequently and it is usually used when Go2Mx or iCoach apps are included in a license and clicking on the iCoach image for instance would run the iCoach app.

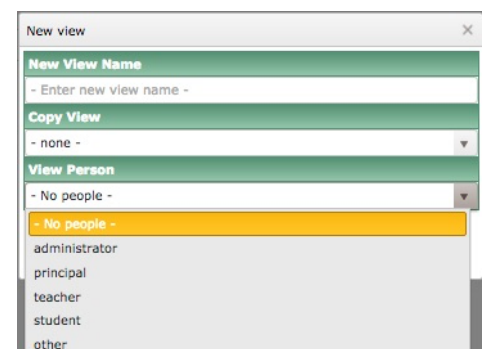


Figure 5 - the New view window

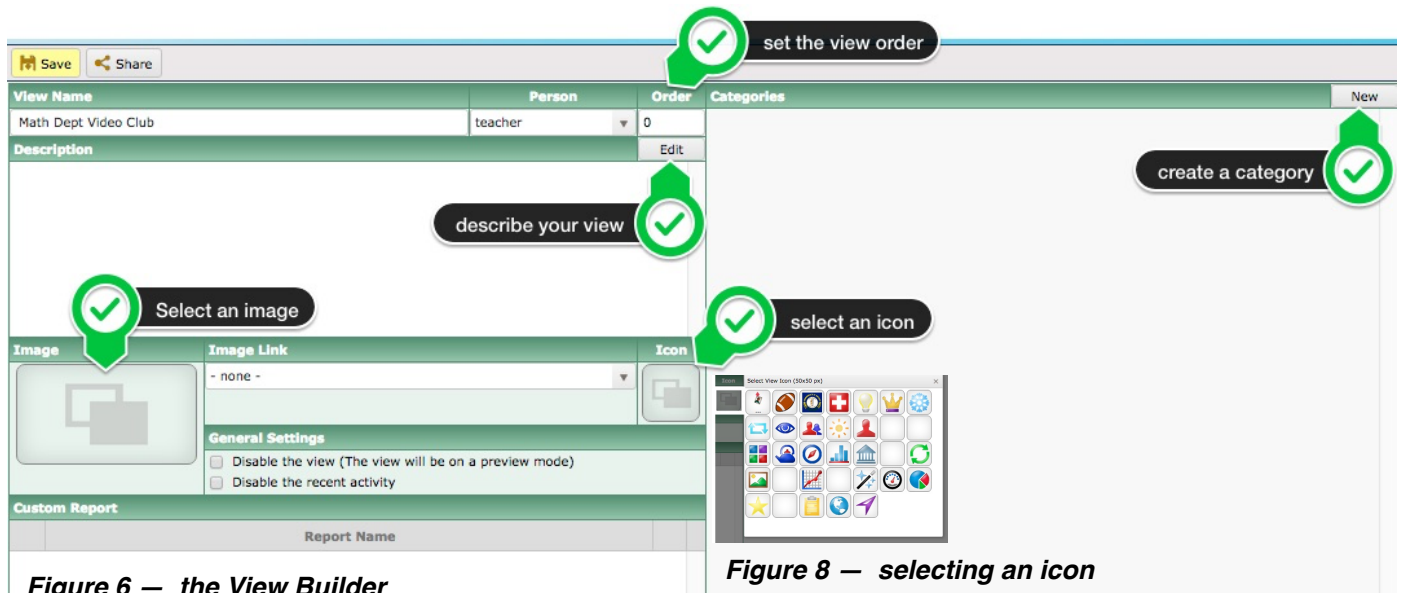


Figure 6 – the View Builder

Figure 8 – selecting an icon



Figure 7 – selecting an image

Figure 6 above shows where you can enter a description for your view which will appear when you click on the ? of your view (see Fig. 1). When you have several views made, you can control the order in which they are displayed and thus rearrange them.

When you select the **image** button you will be able to choose an image for your view from those available or upload your own image by selecting the top left icon as indicated in Figure 7.

Selecting the **icon** button will popup a window from which you can select an icon for your view (Fig. 8).

The 'General Settings' are 2 checkboxes for disabling a view (it will be inactive and greyed out), and disabling recent activity so that the 'Activity' tab will not be on your view(Fig. 1).

If your jurisdiction has had custom reports created, you will be able to select one from your list of custom reports that you have available.

The last thing you are required to do is create at least one category. Categories are where you attach your templates to your view and they are where you organize them according to their type. Thus if you create a category of type **Observation**, you could only attach templates for doing observations and not self assessments etc.

Creating a Category within a View

To create a category you select the **'New'** button at the top right (Fig. 6), enter the name and select the type of the category, and select **'Create'** (Fig. 9). Category types are matched to the types of templates you can create so be careful to have the correct match. You also need to be cognisant of the 'subjects' of templates that you have defined for your view because if it was defined for teachers, then you will not be able to have categories in the view that would have principals or 'no people' attached.

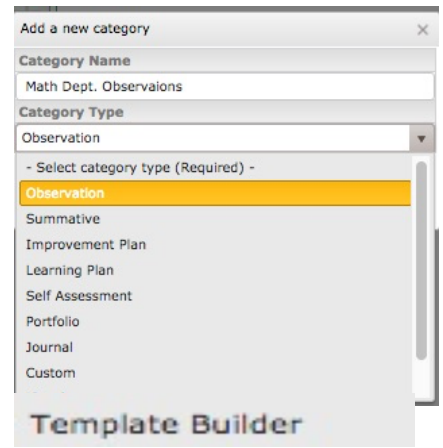


Figure 9 — defining a new category

Note: The last Category Type is called **'Template Builder'** and this category will be available whenever you create a new template which will avoid having to link the template to a View and Category.

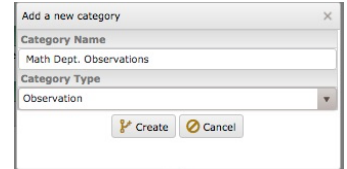


Figure 10— adding a new category

When you select **'Create'** (Fig. 10) you are presented with the 'Category Settings' screen (Fig. 11). The first thing to do is to select an icon (fig. 11) and then select who can view the observations created with templates in this category and who can create observations with them.

Next you select the template from the list of templates (Fig 11) that match the criteria of the View specification as defined in Figure 4 and the Category type defined in Figure 9 and then add the template (Fig. 11). You can add as many templates to a category as you wish and you can create as many categories in a view as you wish.

Lastly you can select the columns and their descriptions to be displayed (Fig 11). Select **'Save and Done'** to save the category and return to the View.

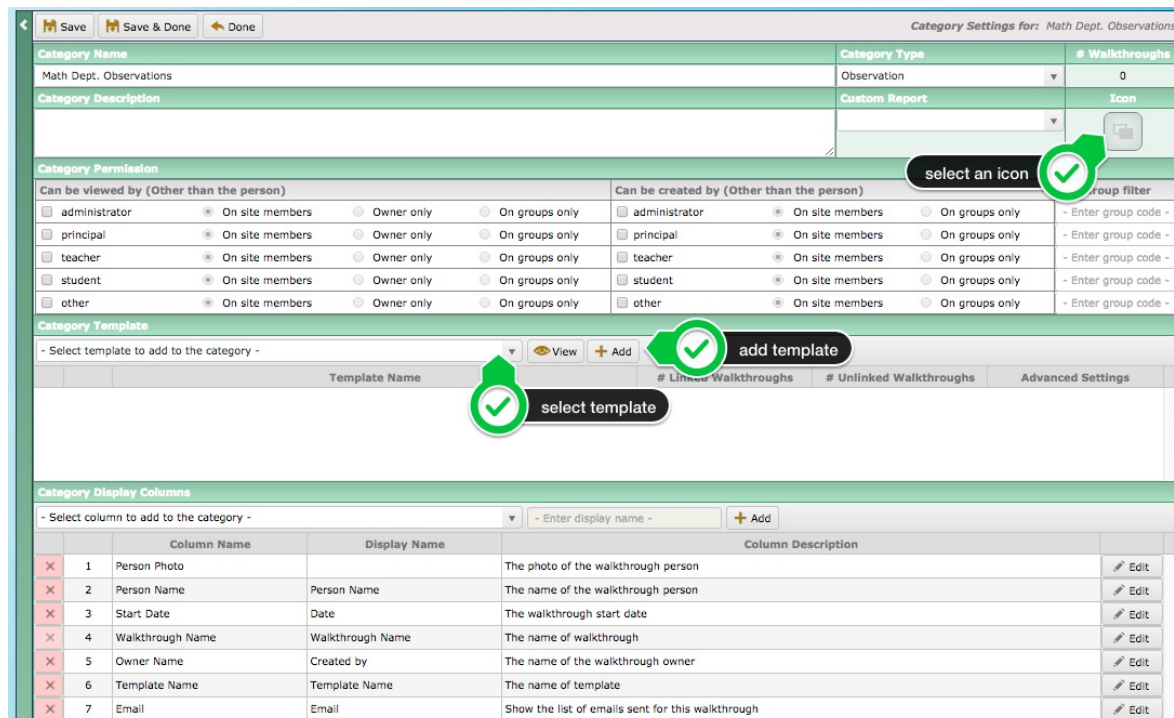


Figure 11— defining the settings for a category

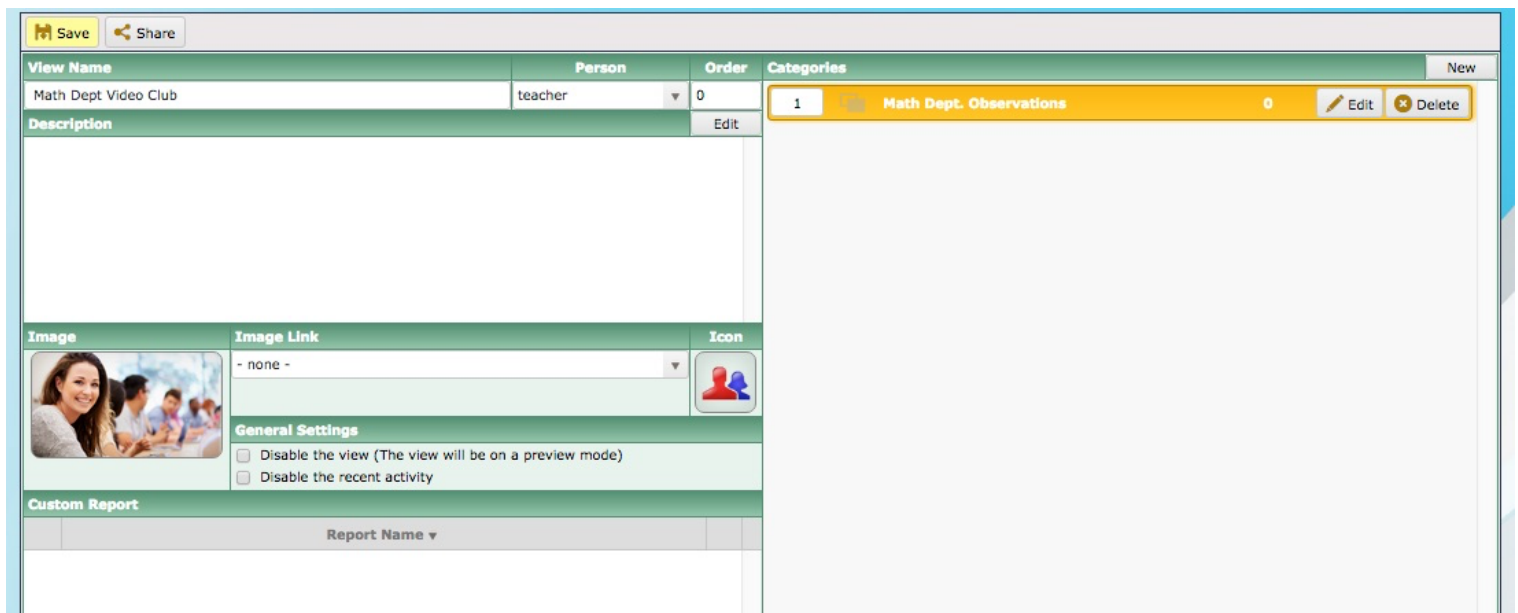


Figure 12— a completed View

Your view can be shared (top left Fig. 12) with individuals, a group or a site. The site can be schools or the entire district, and as noted previously, all the templates you attach to your view will automatically be available to those whom you are sharing with.

The last step is to **'Save'** the view (Fig 12) which returns you to the View listings window, where you can now select **'Done'**

You can return to your view to edit it or add additional categories and/or templates and