



Building Reference Sets

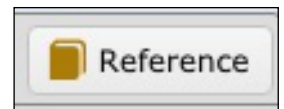
media-x
Powerfully Simple

Reference Set Overview

Reference Sets are typically used to provide additional information to an item (element) on an observation form (Fig. 1). The information can be in the form of textual information to explain something, the retrieval of data that has been collected using different templates from that currently being used, links to a web page or to display images that are stored on your google drive, or any where else on the web.

Here are some examples:

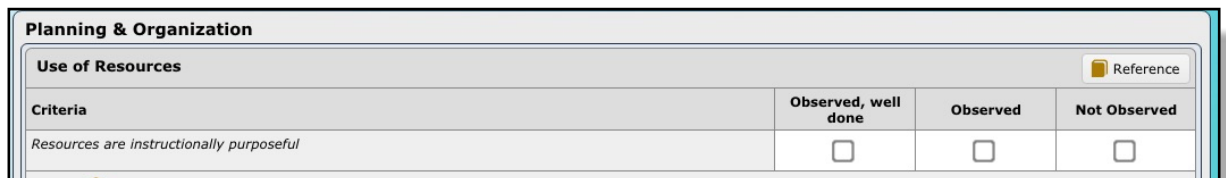
Principal Skinner is evaluating Mrs.Simpson, and one of the items in the formal evaluation form requires the rating of the use of technology. This item has a link to the classroom walkthrough template that has been used throughout the year, and in particular to the item that dealt with using technology. When the principal selects this link



he is shown all the data collected on Mrs. Simpson through the year with regards to using technology, thus giving him the information needed to make a valid and fair assessment.

Another example using the same item on the formal evaluation form would be that selecting the 'reference' would display a page that anecdotally describes what to look for when determining the use of technology.

A third example would be that selecting the 'reference' would display a complete rubric image of the rating scale because it wasn't used on the template form itself.



Planning & Organization			
Use of Resources			Reference
Criteria	Observed, well done	Observed	Not Observed
Resources are instructionally purposeful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 1 - An element with a reference link

The one thing to remember when creating references to data in other templates, is that both templates must be in the same **view** but can be in separate **categories**. Thus in the example above when a formal appraisal needs to show data for informal observations, the 2 templates must be in the same view, but the informal walkthrough could be in an 'Observation' type category and the formal template could be in a 'Summative' type category.

Building a Reference Set

To begin, you select the Reference Set Builder (Fig. 2).

The 'Build' menu is now displayed (Fig. 3) with **Reference Sets** selected and a **New** button located on the left side.

Selecting the **New** button displays a window that prompts you for the name of the reference set you are creating and for the view that that will have access to what you are creating (Fig. 4). Selecting the **Create** button will put you in the **Reference Set Editor** (Fig. 5) where you will see all the categories and their templates that are within the selected view.

The save, share and preview buttons on the **Reference Set Editor** can be used after you have completed the reference set, so for now you should choose the **Manage Components** tab so that you can create the references that are required.

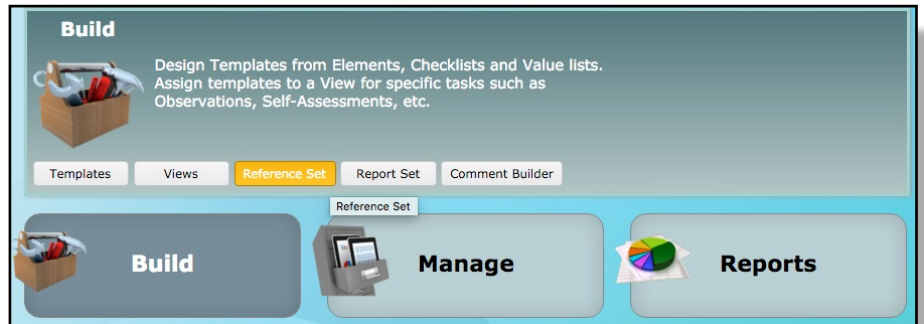


Figure 2 - selecting the Reference set Builder

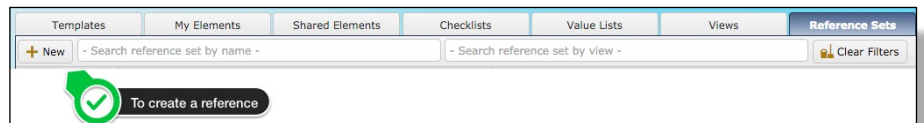


Figure 3 - The 'new' reference set button

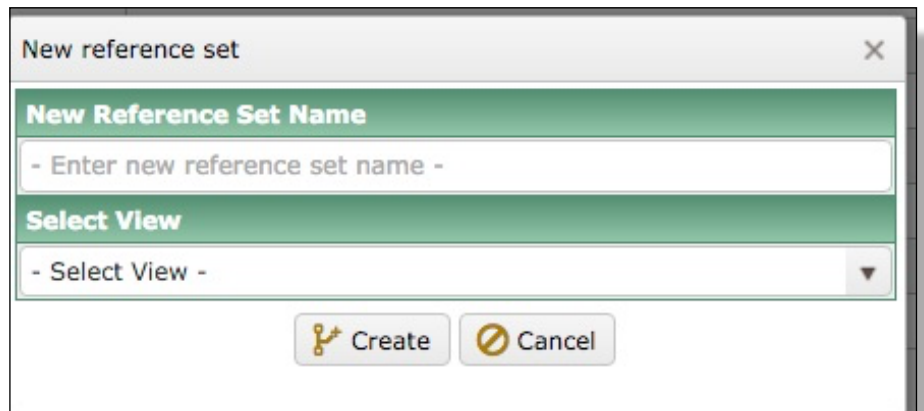


Figure 4 - Naming a reference and selecting the view that will use it.

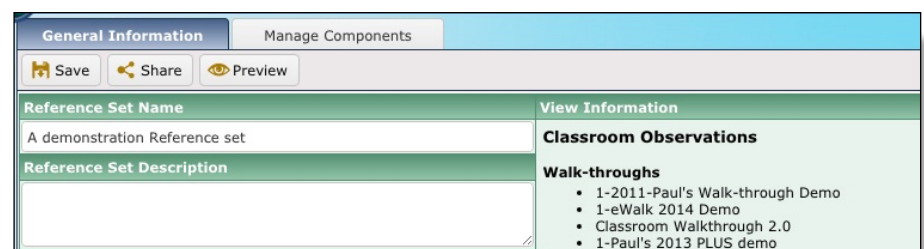


Figure 5 - The Reference Set Editor

Referencing the data in another template

There are several ways that you can create your reference components and we will start with referencing data from one of the available templates. Figure 6 shows all the elements that are used in the templates located in the **View** that you have selected for your Reference Set. The **Add custom comment** is at the top of the list and we will describe its use later. You can filter the elements by either viewing by type, by viewing by one of the available templates, or searching based on the name of the element you are looking for.

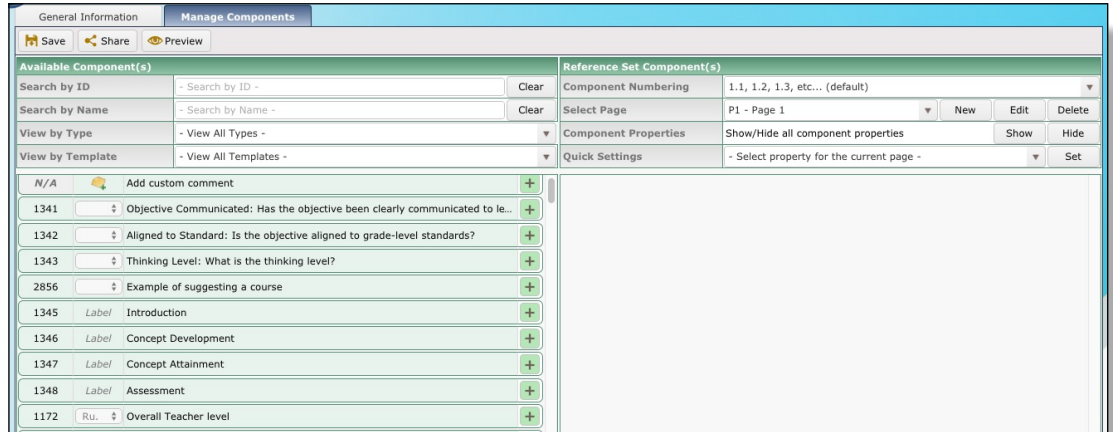


Figure 6 - Managing Components in the Reference Set Editor

Once you have found the element whose data you wish to use you select it (Fig. 7). When you select the element you will be shown all the categories and templates where it is used

(Fig. 8) and you need to select which particular data you wish to use and then complete the selection by clicking the **Add** button, which moves the element to the right side of the editor. The only property that you can select for the element is the Range Date for which the data will be accessed (Fig. 9).

You can continue to add components from the templates used in the selected view as required, and once done, **Preview** and **Save** the Reference Set (Fig. 6), however no data is extracted in Preview.

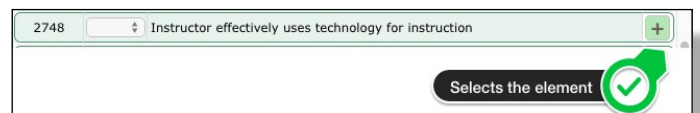


Figure 7 - Selecting an element as a component

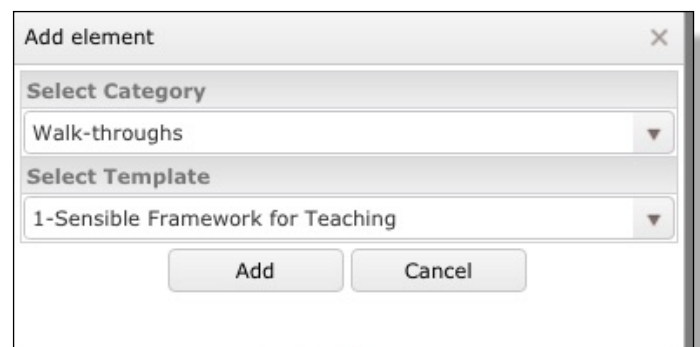


Figure 8 - Selecting the category and template

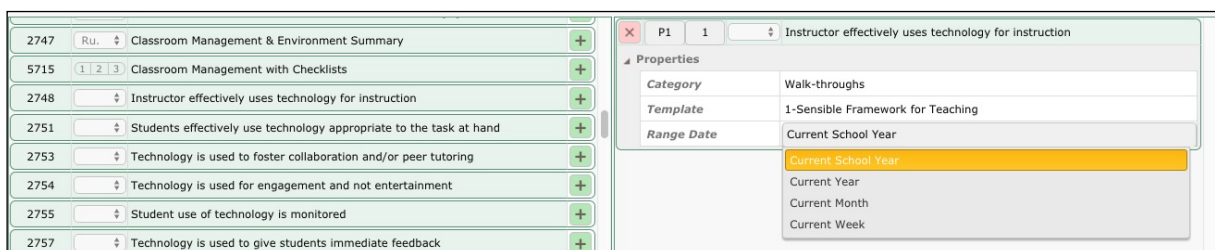



Figure 9 - Selecting the Range Date for a component

Creating a Custom Comment (anecdotal text box)

Figure 10 shows selecting the **Add custom comment** component and Figure 11 shows the result of the selection which is a text entry box with bold, underline, italics and bullet options. The last icon in the editor () is for creating links to images or web pages and we will deal with that option after this one.

After entering the desired text in the editor you **Save**, which places the component on the right side of the Reference Set Editor where selecting **properties** will display the contents.

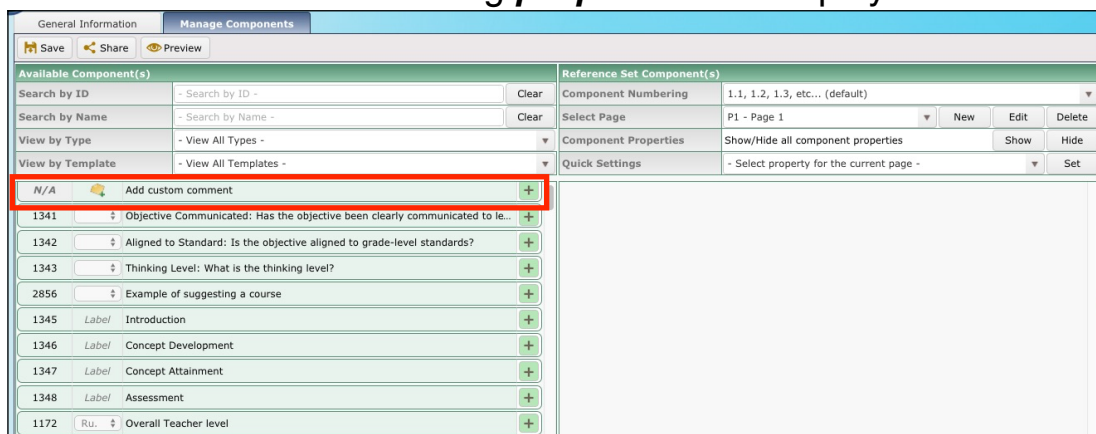



Figure 10 - Selecting a component for a custom comment

Referencing images, documents or web sites

To link to an image or a web site to serve as a reference, you select the hyperlink button () which produces a data entry box as shown in Figure 12. Here you enter the path to the web site or image, the text that names the link, and the text for the tooltip when you mouse-over the name of the link. Using a browser to find the URL for the item you wish to link to, copying it and then pasting it as the web address in the editor is the easiest way to do it, and for images and documents, using your Google Drive is the simplest and you can paste the path to your Google Drive file by right clicking the file and selecting **Get Link** as shown below.

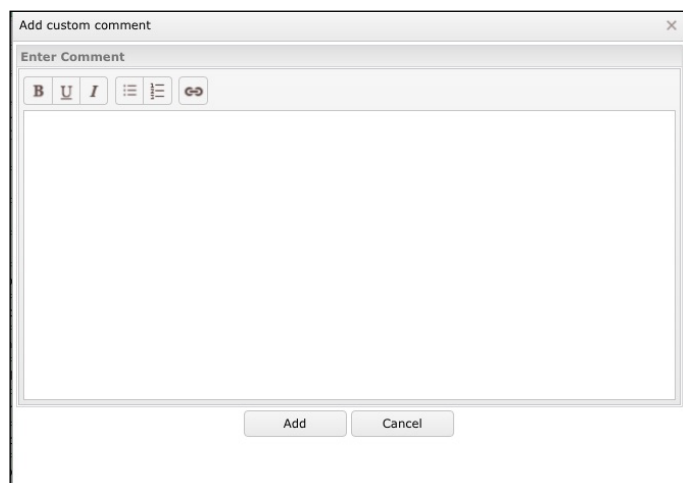
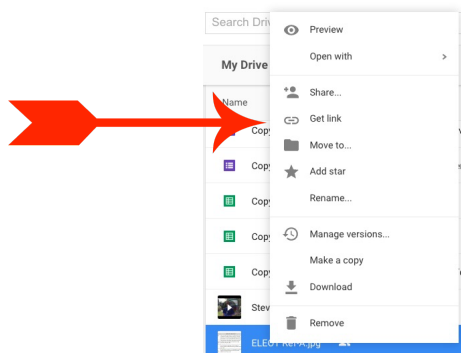


Figure 11 - The comment text editor

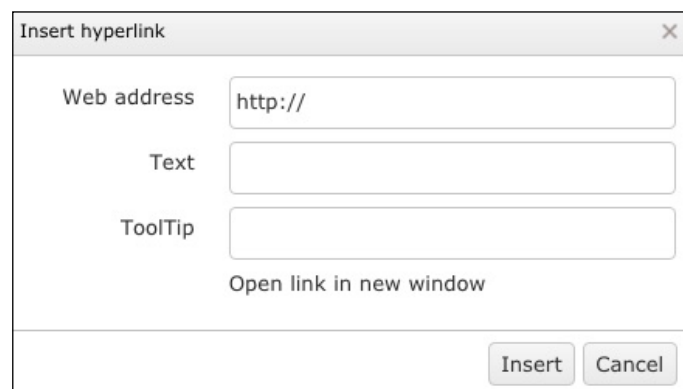


Figure 12 - The hyperlink editor

Using a Reference Set in a template

Reference sets are attached to any element in a template through the **View builder**. To get started, select the **View**, that has the template you wish to add a reference set to and then click the **Edit** button of the **Category** that has the template(Fig. 13). When you edit the category you will see the templates attached to the category and to select the

template you wish to add references to you select the **Element(s)** button of the template (Fig. 14).

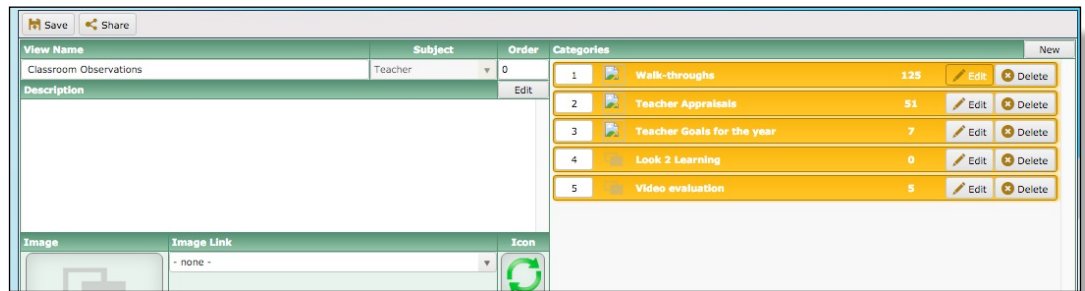


Figure 13 - Selecting a category in a view

Upon selecting Element(s) you will be shown all the elements in the selected template and to add a reference set to an element you select its **Edit** button (Fig. 15).

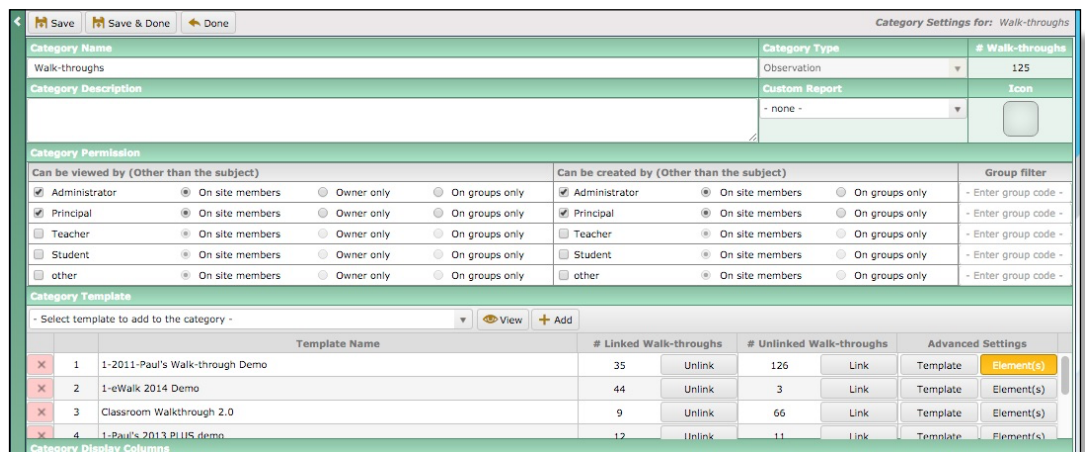


Figure 14 - Selecting the template to add a reference set to

When you edit an element you will be able to attach a Reference Set to it from the list of those which you have access to (Fig. 16) and in addition, you can add a URL as a reference by selecting **Custom Link**. Be sure to select the **check** button where the Edit was to save the change made, and then select **Done** (Fig. 16).

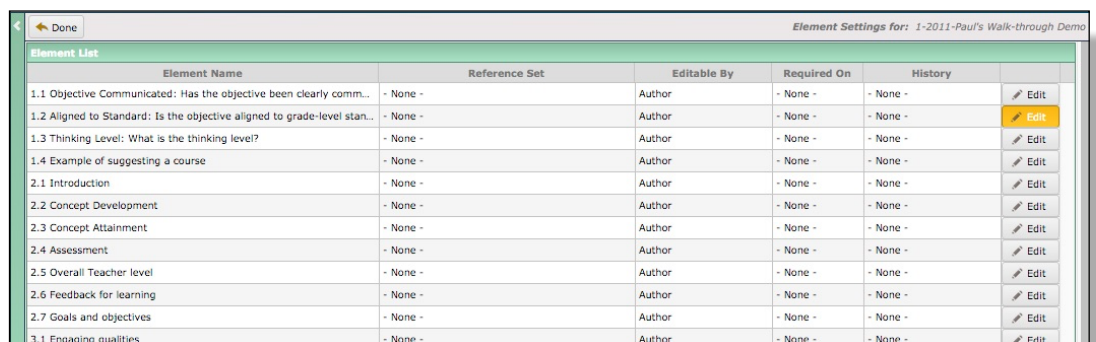


Figure 15 - Selecting the element to attach a reference set to

You template will now have a Reference button attached to the elements you have configured (Fig. 1)

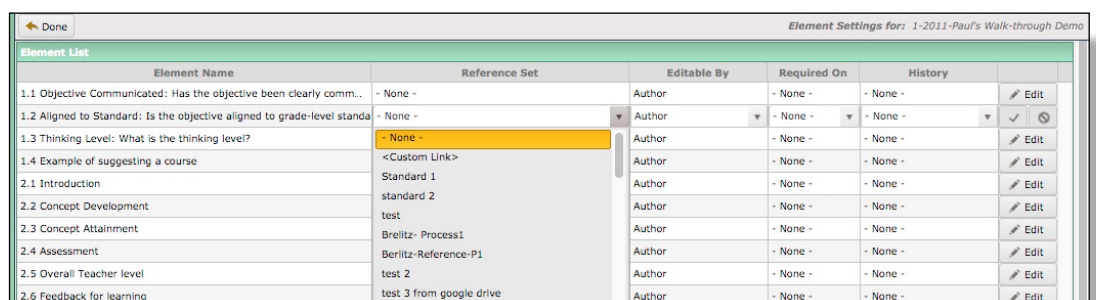


Figure 16 - Selecting a reference set