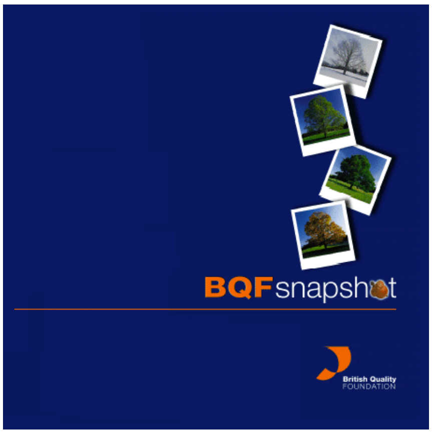

IT TRAINING GUIDE

for

Personal Use or for Training Others

When training others it is accepted practice that those being trained must carry out the computer functions themselves. Just showing them what to do does not work.

Therefore when training others it is recommended that the 'trainer' demonstrates the functions (possibly using a projector) with those being trained mirroring the mouse/ keyboard actions.

This suggested training guide concentrates on the essential functions of the BQFsnapshot software. The more advanced functions listed at the end of this document can be explored when time permits, or when the need arises.

If a short-term training licence is required for a computer, this can be obtained by providing ADA Assessment Solutions Ltd. with the serial number of the program in the computer to be used (01777-711141 or ad@improver.co.uk)

There are twelve main functions that all those using BQFsnapshot, regularly, should be aware of and able to use:

1. **Setting up the computer;**
2. **Accessing the various forms of Help;**
3. **Opening files, creating new files and saving files;**
4. **Accessing workbooks to support self-assessment events;**
5. **Entering self-assessment data and scoring issues;**
6. **Creating central master files;**
7. **Creating and using group files;**
8. **Creating automated self-assessment reports;**
9. **Entering the detail of action points;**
10. **Creating action plans;**
11. **Entering Balanced Scorecard KPI's and performance information;**
12. **Creating Balanced Scorecard reports**

Those using the software should also be aware of a few additional features that are important

1. SETTING UP THE COMPUTER (YOU NEED TO BE AWARE)

If a prospective user of the BQFsnapshot software has limited access rights to their computer, installation of the program must be carried out by an IT Administrator since full Administrator Rights are required to load the program.

To use the program a user will usually require either 'Full Administrator Rights' or 'Power Administration Rights'. If it is absolutely essential that the user can only have 'Limited User Rights' there is an installation routine that can meet this need - see the bottom of the page www.improver.co.uk/sw_default.html or contact the BQF helpline – 01777-711141 or ad@improver.co.uk

After installation the IT Administrator/ User will need to set the default location settings for :

- saving working files;
- saving report documents;
- accessing the organisation's evidence library;
- accessing the organisation's Management Information System.

To establish these settings:

1. click '**Options**' on the main menu bar in the **main program;**
2. click '**Default Location Settings'**;
3. click '**Select a different directory'** for either 'Default save location', 'Default location for evidence files' or 'Default location for report documents';
4. click '**Scorecard**' to access the Balanced Scorecard program;
5. click '**Open a new scorecard'**;
6. click 'Options' on the top menu bar of the **Balanced Scorecard program;**
7. click '**Default Location Settings'**;
8. click '**Select a different directory'** for either 'Default save location' or 'Default location for management information system (M.I.S.);

Correct installation and appropriate settings will enable the program to be operated effectively, and efficiently, by the User.

2. Accessing the Various forms of Help (You need to know where this is Available)

To access the various forms of Help:

- click **'Open'** on the initial 'Splash' screen to open the 23 page **User Guide** in PDF format. This can be printed out and used as a reference document. There is a page index at the back;
- at the '**Quick Tutorials'** screen, after the Splash Screen on opening the program, select and click a required tutorial. These tutorials are in MS PowerPoint format and go through all the main functions of the program;
- click '**Help**' on the main menu bar and then '**Contents**' to access traditional help files which describe all the software features.

3. Opening Files, Creating New Files and Saving Files (This is Essential for Users)

Those learning should do the following:

Opening a file:
1. click '**File**' on the main menu bar and then click 'Open'
2. or click '**Open**' at the **QuickStart** screen;
3. view the files in the C:\Program Files\BQFsnapshot 3.4\Current folder;
4. select a file to open, e.g. Illustration1 consensus Oct 2002.ada;
5. click 'Open' to open this file.

Creating a new file:
1. click '**File**' on the main menu bar and then click 'New'
2. or click '**Open**' at the **QuickStart** screen;
3. an 'untitled' new file will be opened;
4. it is recommended that new, untitled files are immediately saved.

Saving a new file:
1. click '**File**' on the main menu bar then click '**Save As**';
2. in the top right hand box enter the file name, e.g. 'test';
3. click 'Save'

4. Accessing workbooks to support self-assessment events

Those facilitating self-assessment workshops will choose the form of workbook to support self-assessment events. Those learning should ensure that they can access the self-assessment workbooks.

There are 2 ways to access the self-assessment workbooks:

1. click the '**Text**' button on the QuickStart menu on opening the program;
2. click '**Help**' on the main menu bar and then **'View Workbooks'** on the Help menu;

You will then be presented with a menu of self-assessment workbooks which have the following features:

- all workbooks are in 'table' format in MS Word.
- all workbooks have blank spaces where strengths, areas for improvement and supporting evidence can be added. Workbooks also allow a score to be noted;
- where a workbook is to be printed out for hard copy use, the spaces for entering these notes (cells in the tables) should be made the appropriate size before printing out.
- the workbooks can also be used in electronic format where the spaces for text will automatically expand (Use the 'Table/ Properties/ Cell feature in MS Word if there the setting for text in a cell is incorrect)

5. ENTERING SELF-ASSESSMENT DATA AND SCORING ISSUES

Those learning need to be able to enter scores and notepad information from consensus group workshops. In some cases this may be entered by an 'assistant' to a workshop facilitator during a workshop.

There are two types of workbook:
- those which work to the 64 quality statements in Corporate terminology, both with full text and simplified text;
- those which work to the 64 quality statements in Corporate terminology, both with full text and simplified text;

Those learning should enter typical information

Take the illustrative Appendix 1A and do the following:

1. ensure that your **'test.ada'** file is open
2. for each of the 2 'quality statements' in Appendix 1A
3. locate the issue scoring screen by clicking **'Index'** at the bottom of the program screen and then clicking the sections in the left hand screen to show the issues in each section in the right hand screen. When you have identified the location of each issue in 'Index' double click to go to the issue scoring screen (Customer Consultation is in Customer Focus and Competencies is in People Development);
4. note the number in the top right hand corner of the box with the quality statement text. This is the consensus agreement for the grading of the issue (3 = Critical - red, 2 = Important - yellow, 1 = relevant - blue). Click the appropriate button on the **'traffic lights';**
5. note the 2 scores for the issue (5 points on a 0 - 100 scale) and enter the scores using the slider bars;
6. click **'Notepad'** towards the bottom right hand corner of the screen and enter the notes to the appropriate boxes in the Notepad feature. Click '**OK**' when you have entered the text;

6. CREATING CENTRAL MASTER FILES

One self-assessment methodology is to create separate self-assessment files for different parts of an organisation and then bring this self-assessment information together into a central master file.

Those learning should do the following to learn how this can be done:

1. ensure that the '**test.ada**' file is open;
2. go to '**File**' on the main menu bar and then click '**Text Transfer'**;
3. select '**Import**' (which means that you are going to import text to your 'test.ada' file)
4. select '**Notepad**'
5. select '**Merge**' (which means that the text that you will import will merge with any existing text, not overwrite it)
6. select the file from which you wish to import the text - select **Illustration1 consensus Oct 2002.ada**
7. click **'Transfer'** to transfer and merge the text

You will find that the notepad text in the Illustration1 consensus Oct 2002.ada file is now in your 'test.ada' file following any other notepad information that you have entered.

7. CREATING AND USING GROUP FILES

One option in organisations is to score the position in different areas. This will best be achieved by having a consistent facilitator to ensure that similar scoring principles are used.

Another option is to score the position one year later.

In each case there will be the need to compare files.

Those learning should do the following to learn how this can be done:

1. go to '**Compare**' on the main menu bar;
2. click **'Create Group';**
3. this will reveal a screen that shows all the files (individual and group) that are available in the '**Files to Add'** box;
4. highlight the files one by one that you wish to compare and click '**Copy**'
5. the content of the new group file will then show in the '**New Group'** box;
6. click '**View**' to view the new '**Group**' file that you have created;
7. go to an issue scoring screen and note that the '**Low, Average and High'** scores for the issue in the files in the new group file are shown;
8. go to '**Section Summary'** where the bar chart has chevrons which show the position for all the issues in the section. All other bar charts have similar features.
9. note the drop down box in the top right hand corner where you can select the file for which you wish to compare scores.
10. go to '**Compare**' on the main menu bar and select '**Comparison Table'** to view how the scores of all files can be compared.
11. you can edit the contents of a group file by selecting '**Edit Group'** on the '**Compare**' sub menu.

If at any time the drop down box in the top right hand corner of the screen fails to appear when a group file is open, which for technical reasons is possible, go to 'Compare' and click 'Show drop down box'.

8. Creating Automated Self-Assessment Reports

A major output from the software are automated self-assessment reports.

Those learning should do the following to learn how the automated reports are prepared and what they look like:

1. click '**File**' and then '**Open**';
2. select '**Illustration1 consensus Oct 2002'** which has some illustrative notepad text and click '**Open**';
3. to prepare a self assessment report concerned against the 32 criterion parts of the EFQM Excellence Model click '**Model**' on the main menu bar and then click '**Self-Assessment Report'**;
4. when asked to save the report in the 'Report Documents' folder type in a new name, e.g. EFQM test report, and click '**Save**';
5. to view the self-assessment report that you have created click either '**Improvement**' or '**Help**' on the main menu bar and then '**Report Documents'**
6. highlight the report that you wish to access in the Report Documents folder and click '**Open**' to access the report document.

All the automated self-assessment documents are in tabular format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the BQFsnapshot software program.

9. Entering the Detail For Action Points

After undertaking self-assessment the key task is to identify and detail the action points for improvement action plans. Each of the 64 quality statements has a feature to detail up to 5 action points.

Those learning should do the following to learn how to enter typical action point information to the software:

Take Appendix 2 which shows the detail of a number of action points in the action plan format;

1. ensure that your '**test.ada**' file is open;
2. for each of the 4 action points:
3. locate the issue scoring screen by clicking '**Index**', clicking the sections in Index to locate the issue, highlighting and then double clicking the issue (External Comparison is in Results Orientation and Customer Consultation is in Customer Focus);
4. click '**Action**' in the bottom right hand corner
5. enter the text for each '**Action Point'** (without the short heading for the issue) and the '**Success Indicators'**;
6. using the drop down boxes select, or type in, **'Responsibility'** for the action point, the '**mini plan'**, as noted on Apendix 2, and the '**Dates**' involved;

7. enter any '**Progress Comments'**, making sure to note the date initially with a carriage return;
8. always click '**OK**' to save the text that you have entered or it will be lost on exiting the featured.

10. Creating Action Plans

Having entered all your improvement action points the action point information can be organised by the software to create a range of action plans.

Those learning should do the following to learn how the various action plans reports can be created in the format illustrated by Appendix 2 as used in point 9 above:

1. click '**File**' and then '**Open**';
2. select '**Illustration1 consensus Oct 2002'** which has some illustrative action point information and click '**Open**';
3. to access the Action Plan screen click '**Improvement**' on the main menu bar and then click '**Action Plan'**;
4. click the top left drop down box to view the action points organised in various ways, e.g. by section, or all sections, by EFQM criterion, by responsibility or by mini plan;
5. use the second drop down box to select the specific breakdown you require;
6. you can view the content of your proposed action plans by scrolling the screen selection;
7. you can edit the text of an action point by clicking the action point test on the action plan screen. Click OK to update and return
8. to create the action plan either click the '**Print**' button on the action plan screen or click '**Print**' on the main menu bar, then '**Action Plan'** and make the same selection that you have made on the action plan screen;
9. When asked to save the action plan in the 'Report Documents' folder type in a new name, e.g. Action Plan test 1, and click '**Save**';
10. Repeat this process to create other action plans;

To view the action plans that you have created:

1. click either '**Support**', '**Improvement**' or '**Help**' on the main menu bar and then '**Report Documents';**
2. highlight the action plan that you wish to access in the Report Documents folder
3. click '**Open**' to access the contents.

All the automated action plan documents are in tabular format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the software program.

11. Entering Balance Scorecard KPIs and Performance Information

The Balanced Scorecard feature to manage Key Performance Indicators (KPIs) is a separate, but linked program, within BQFsnapshot.

Those learning should do the following to learn how to open and save Balanced Scorecard files, enter KPI performance information and create performance reports.

To access the Balanced Scorecard feature either click the '**KPIs**' button at the QuickStart screen entering the software or click the '**Scorecard**' button at the bottom of an issue scoring screen;
Then:

1. at the mini QuickStart menu click '**Open a new scorecard'**.
2. click '**File**', ,then **'Save As'**, then name the file, say '**test**', and then click '**Save**' to save the file;
3. with the **'test.ads'** file open take **Appendix 3** which has the detail of 2 KPIs to enter;
4. at the **KPI** listing screen enter the 2 KPIs – Customer satisfaction to the Customer Perspective and Credit notes issued to the Financial Perspective;
5. then click the '**Performance**' button at the bottom of the screen to access the Performance Information screens for each KPI.
6. use the drop down box to select the new KPIs and the enter the performance information from Appendix 3 for each KPI, including the performance rating;
7. alternatively you can go to '**File**', then '**Open**' and open the '**Scorecard Illustration.ads'** file. You can then add these KPIs as additional KPIs to the illustration file.

12. Creating Balance Scorecard Reports

Having entered all the performance information for KPIs it will be necessary to create appropriate reports for the Balanced Scorecard position.

Those learning should do the following to learn how to create Balanced Scorecard reports based on the KPI performance information.

1. in the Balanced Scorecard program click '**File**' and '**Open**'
2. highlight '**Scorecard Illustration.ads**' and click '**Open**'
3. click the '**View Scores'** button at the bottom of the screen to view the 'traffic light' performance for all KPIs.

This screen can be exported as follows:

1. click '**File**' and then click '**Screen Information Export'**;
2. drag the lines of the box to surround the area that you wish to export;
3. right click the mouse to view the menu;
4. click **'copy image to clipboard'**
5. open MS Word and in a new file click **Ctrl + V** to paste the image of the overall KPI Performance screen in MS Word.
6. use a colour printer to obtain the colour print of this screen.

To obtain a supportive KPI Performance Report that details all the information on the KPI Performance Information screens:

1. click '**Print**' on the Balanced Scorecard top menu;
2. select '**Current Performance Report'**

3. **select the order** for the KPIs to be listed (you can have the worse performing KPIs listed first)
4. click '**Print**';
5. when asked to save the KPI Performance Report in the 'Report Documents' folder type in a new name, e.g. KPI Report test 1, and click '**Save**';

To view the KPI Performance Report that you have created:

1. click either '**Improvement**' or '**Help**' on the main menu bar and then '**Report Documents';**
2. Highlight the KPI Performance Report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

The automated KPI Performance Reports are in tabular format in MS Word and can be edited, and formatted as required. They can also be spell checked - a feature that is not available in the software program.

13. Other Features

Other important features (use the Help files for detailed functionality) are:

- the **Screen Information Export** feature, as described in section 12 above, is also available in the main program. Click '**File**' then '**Screen Information Export'** as use as above;
- you can export your '**Notepad**' or '**Action Points'** text as a .txt file or your detailed scores for issues as a .csv file by clicking **'File'** then '**Export File Information**';
- when saving files you have the option to make the files **'Read Only'** or '**User Only'**, both password protected using the '**File Security'** option;
- there are numerous **bar chart screens** to analyse and consider your scored position.

14. BQF Helpline

If there are any technical issues that you wish to discuss regarding the practical use of BQFsnapshot, please contact the BQF helpline:

Telephone:	01777 711141
Fax:	01777 711144
Email:	ad@improver.co.uk

BQF snapshot

Training Pack - Issue Information to enter to Software (Item 5)

Illustrative information in a Workbook which directly address issues

Where do you rate your practice against the following statement?	Approach with Review / Systematic Deployment										Current Strengths / Strong evidence to report	Areas for Improvement / Evidence to demonstrate improvement
Customer Consultation: 3 There is a structured dialogue with customers to understand their needs and expectations and gather suggestions for improvement. *We communicate, regularly, with our customers to understand what they need and expect*	Not Evident		Routine Procedure		Effective Regular Review			Very Effective Well Refined		Role Model	*The is regular contact with a few customers (larger more important customers) but the outcomes of contact are not recorded unless there are critical issues.*	*Improve records of direct customer contact.* *Develop regular customer feedback mechanisms* *Review customer contact information and feedback regularly to identify areas for improvement*
				x								
	AdHoc		25% of Areas		50% of Areas			75% of Areas		All Areas	*Ad hoc correspondence, emails etc.*	*Customer contact records* *Customer survey summaries* *Reports reviewing customer contact and feedback*
						x						
Competencies: 2 The knowledge, competencies and qualifications of all employees are identified, used and developed to meet the needs of the business *We identify and develop the knowledge, competencies and qualifications of all our employees*	Not Evident		Routine Procedure		Effective Regular Review			Very Effective Well Refined		Role Model	*The percentage of employees with qualifications relative to their job has increased substantially in recent years*	*More people could be encouraged to gain relevant qualifications* *More employees could improve their knowledge and competencies through participation in business improvement projects*
					x							
	AdHoc		25% of Areas		50% of Areas			75% of Areas		All Areas	*Personnel records*	*Personnel records*
								x				

BQFsnapshot

Training Pack - Action Point information to enter (Item 8)

Overarching Objectives and Introduction Notes

No.	Improvement Action Point	Deadline Done	Responsibility	Assess & Review	Success Indicators	Last Progress Report
3.1	**External Comparison **** Design a benchmarking programme to compare practice and performance with peer organisations	30/11/04 30/11/04	Quality Manager		List of key areas of practice and performance that should be benchmarked	31.5.2005 List of key areas debated and completed
3.2	**External Comparison **** Undertake a benchmarking programme to compare practice and performance with peer organisations	31/12/05	Quality Manager	31/05/05	Rolling programme of visits to peer organisations organised	31.5.2005 Programme well established with 3 visits having taken place in last 6 months
12.1	**Customer Consultation ***** Improve reporting of outcomes of personal contact with customers	31/08/04 31/07/03	Marketing Director	31/12/04	Reports are prepared for all planned and ad hoc meetings with customers to ensure that all needs and expectations are understood and recorded	31.12.2004 Reports now being filed for all contact with customers
12.2	**Customer Consultation ***** Establish regular contact with smaller customers	30/12/04	Marketing Director		Regular customer surveys are being carried out with smaller customers	31.12.2004 Form of survey for smaller customers still being considered

Mini Plan for External Comparison – Performance Management
Mini Plan for Customer Consultation – Customer Management

Training Pack – Balalanced Scorecard information to enter (Item 11)

Balanced Scorecard KPI Performance Report

KPIs relative to		**Red**	Red as defined
		Amber	Amber as defined
Report dated	14/11/2004	**Green**	Green as defined

KPI Report Overview

No.	Key Performance Indicator	Objective	Target	Deadline	Responsibility	Review Frequency	Last 3 Period Performance Comments on Performance/ Action
1.6	Customer satisfaction	Results from customer surveys to show huigh levels of customer satisfaction	85% or more of customer survey returns to show that customers are Satisfied of Very Satisfied with the level of service being provided	12/2004	Sales Team	Monthly	**Amber Green Amber** Most recent survey showed a decline from 87% to 84% only
2.7	Credit notes issued	High quality of product and services provided to ensure high customer satisafaction with virtual elimination of credit notes issued due to poor quality	Credit notes as a % of sales to be less than 0.05% of sales	12/2004	Production Director	Monthly	**Green Green Green** Credit notes due to poor quality of product or service are considerably reduced