



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 Excelsior Connexions 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 Excelsior Connexions, 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**
- 13. Creating Balanced Scorecard Comparison Reports**

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

1. SETTING UP THE COMPUTER (ENSURE UNDERSTANDING)

If a prospective user of the Excelsior Connexions software has limited access rights to their computer, installation of the program may 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.

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

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

To establish these settings:

- click '**Options**' on the main menu bar in the **main program**;
- click '**Default Location Settings**';
- click '**Select a different directory**' for either 'Default save location', 'Default location for evidence files' or 'Default location for report documents';
- click '**Scorecard**' to access the Balanced Scorecard program;
- click '**Open a new scorecard**';
- click 'Options' on the top menu bar of the **Balanced Scorecard program**;
- click '**Default Location Settings**';
- 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 (ENSURE KNOWLEDGE OF WHERE IT IS AVAILABLE)

To access the various forms of Help:

- click **'Read'** on the initial 'Splash' screen to open the 32 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 (ESSENTIAL FOR USERS)

Those learning should do the following:

1. **Opening a file:**
 - click **'File'** on the main menu bar and then click **'Open'**
 - or click **'Open'** at the **QuickStart** screen;
 - view the files in the C:\Program Files\Excelsior Connexions 3.6\Current folder;
 - select a file to open, e.g. Consensus 092002.ada;
 - click **'Open'** to open this file.
2. **Creating a new file:**
 - click **'File'** on the main menu bar and then click **'New'**
 - or click **'Open'** at the **QuickStart** screen;
 - an 'untitled' new view file will be opened;
 - it is recommended that new, untitled files are immediately saved.
3. **Saving a new file:**
 - Click **'File'** on the main menu bar then click **'Save As'**;
 - In the top right hand box enter the file name, e.g. **'test'**;
 - 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:

- click the **'Text'** button on the QuickStart menu on opening the program;
- 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.

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. 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. Those learning could do this for a short workbook - say Investors in People. 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 directly to an some of the 135 issues;
- those which work directly to the quality statements of specific standards where cross-referencing to the related issues is stated.

Those learning should enter information for both types of workbook

For workbooks which work directly to some of the 135 issues take the illustrative Appendix 1A and do the following:

1. Ensure that your '**test.ada**' file is open
2. For each of the 2 'issues' in Appendix 1A
 - Locate the issue scoring screen by clicking '**Index**' at the bottom of the program screen and then selecting 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;
 - Note the number in the top right hand corner of the box with the issue 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**';
 - Note the 2 scores for the issue (5 points on a 0 - 100 scale) and enter the scores using the slider bars;
 - 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;

For workbooks which work directly to the quality statements of specific standards take the illustrative Appendix 1B and do the following:

1. Ensure that your '**test.ada**' file is open
2. For the strengths and areas for improvement in Appendix 1B
 - Note the related issues (6) and decide which of the issues is most appropriate to record the 'notepad' information
 - Locate the appropriate issue scoring screen, or screens, by clicking '**Index**' at the bottom of the program screen and then selecting clicking the sections in the left hand screen to show the issues in each section in the right hand screen (the number of the issue indicates the approximate location of the issue). When you have identified the location of each issue in 'Index' double click to go to the issue scoring screen;
 - Note that these workbooks concentrate on identifying strengths and areas for improvement and not the grading of issues or the score of an issue;
 - 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 **consensus 092002.ada**
7. Click '**Transfer**' to transfer and merge the text

You will find that the notepad text in the consensus 092002.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 Partnerships 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.
12. **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 the various automated self-assessment reports.

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

10. Click '**File**' and then '**Open**';
11. Select '**consensus 092002**' which has some illustrative notepad text and click '**Open**';
12. To prepare self assessment reports concerned with Ofsted standards click '**Support**' on the main menu bar and then click '**Automated Self Assessment**';
13. Click to select a report, e.g. Ofsted SCYP SAS, from the list of available self assessment reports;
14. When asked to save the report in the 'Report Documents' folder type in a new name, e.g. Ofsted SCYP SAS test, and click '**Save**';
15. Repeat this process for other available Ofsted standard reports;
16. Click '**Model**' on the main menu bar and then '**Self-Assessment Report**' and repeat the process to create a draft self-assessment report against the 32 criterion parts of the EFQM Excellence Model;
17. Click '**Standards**' on the main menu bar and then a quality standard and then '**Self-Assessment Report**' and repeat the process to create a draft self-assessment report against the assessment criteria of the quality standard selected, e.g. Investors in People;
18. To view the self-assessment reports that you have created click either '**Support**', '**Improvement**' or '**Help**' on the main menu bar and then '**Report Documents**'
19. Highlight the report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

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 Excelsior Connexions 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 an improvement action plan. Each of the 135 issues 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:

1. Take Appendix 2 which shows the detail of a number of action points in the action plan format;
2. Ensure that your '**test.ada**' file is open;
3. For each of the 3 action points:
 - locate the issue scoring screen by clicking '**Index**', clicking the sections in Index to locate the issue, highlighting and then double clicking the issue;
 - click '**Action**' in the bottom right hand corner
 - enter the text for each '**Action Point**' (without the short heading for the issue) and the '**Success Indicators**'
 - using the drop down boxes select, or type in, '**Responsibility**' for the action point, any '**mini plan**', in this case 'Partnerships', and the '**Dates**' involved;
 - enter any '**Progress Comments**', making sure to note the date initially;
 - 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 already noted under 9 above:

1. click '**File**' and then '**Open**';
2. select '**consensus 092002**' 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 Ofsted SCYP or other Ofsted standard questions, by quality standard, 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. to create the action plan either click the '**Print**' button 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;
8. 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**';
9. Repeat this process to create other action plans;
10. To view the action plans that you have created click either '**Support**', '**Improvement**' or '**Help**' on the main menu bar and then '**Report Documents**';
11. Highlight the action plan that you wish to access in the Report Documents folder and then 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 Objectives and their Key Performance Indicators (KPIs) is a free standing feature

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

1. To access the Balanced Scorecard feature either click the '**Objectives**' button at the QuickStart screen entering the software or click the '**Scorecard**' button at the bottom of an issue scoring screen;
2. Click through the initial scorecard screens and at the mini QuickStart menu click '**Start your scorecard**'.
3. Click '**File**', then '**Save As**', then name the file, say '**test**', and then click '**Save**';
4. With the '**test.ads**' file open take **Appendix 3** which details 2 key Objectives to enter;
5. At the **Key Objectives** listing screen enter the 2 KPIs under **Enjoying and Achieving**;
6. Then click the '**Performance**' button at the bottom of the screen to access the Performance Information screens for each key objective.
7. Use the drop down box to select the key objective and the enter the performance information from Appendix 3, including the performance ratings

12. CREATING BALANCE SCORECARD REPORTS

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

Those learning should do the following to learn how to create Balanced Scorecard reports based on the key objective 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 key objectives.
4. This screen can be exported as follows:
 - click 'File' and then click 'Screen Information Export';
 - drag the lines of the box to surround the area that you wish to export;
 - right click the mouse to view the menu;
 - click '**copy image to clipboard**'
 - open MS Word and in a new file click Ctrl + V to paste the image to secure a copy of the overall key objectives performance screen in MS Word (adjust the page settings as required in MS Word).
 - Use a colour printer to obtain the colour print of this screen.
5. To obtain a supportive Key Objectives Performance Report that details all the information on the Key Objectives Performance Information screens:
 - Click 'Print' on the Balanced Scorecard top menu;
 - Select 'Objectives Performance Report'
 - Select the order for the Key Objectives to be listed (you can have the worse performing Key Objectives listed first)
 - Click 'Print';
 - when asked to save the Key Objectives Performance Report in the 'Report Documents' folder type in a new name, e.g. Performance Report test 1, and click '**Save**';
 - To view the Key Objectives Performance Report that you have created click either '**Reports**' on the scorecard Print menu or '**Help**' on the scorecard menu bar and then '**Report Documents**';
 - Highlight the Key Objectives Performance Report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

The automated Key Objectives 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. CREATING BALANCED SCORECARD COMPARISON REPORTS

It is possible to cascade top level key objectives down to teams or even individuals.

In the scorecard feature there are 3 illustration scorecard files for individuals in a team. The key objectives are the same but the performance is different. The Key Objective Performance Report format for individuals is slightly modified so that individuals have the opportunity to comment before a meeting to discuss performance

It is possible to create a comparison file and a comparison report in MS Excel.

1. To create a Comparison File
 - Click **Compare** on the menu bar and then **Create Comparison Group**;
 - Select the 3 individual illustration scorecards (one by one) and click the **Add to Group** button;
 - Enter the name of the new group file, say '**Group test**' and click '**Save Group File**'
 - You will note that the name of the file is now Group test.adc and if you click the **Performance** page you can note the following:
 - the detail of the targets for all the files has been created in the target boxes. Click the magnifying glass to edit each target for the group file (the team);
 - that you can enter any appropriate notes for the team;
 - that you cannot alter the performance rating it is the average of the individual files.
2. To create a Comparison Reports:
 - Keep the Group test.adc file open;
 - Click **Compare** on the menu bar and then **Comparison Report**;
 - A box to select the key objectives to compare will appear. Click '**Select those which are named**' and click '**Create Report**';
 - When asked to save the Comparison Report in the 'Report Documents' folder type in a new name, e.g. Comparison Report test, and click '**Save**';
 - To view the Comparison Report that you have created click '**Help**' on the scorecard menu bar and then '**Report Documents**';
 - Highlight the Comparison Report that you wish to access in the Report Documents folder and then click '**Open**' to access the contents.

14. OTHER FEATURES

Other important features, where you can use the Help files for detailed functionality, are:

1. The **Screen Information Export** feature, as described in section 12 above is available in the main program. Click '**File**' then '**Screen Information Export**' as use as above;
2. 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**';
3. 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.



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

Illustrative information in Workbooks which directly address quality indicators

Principle 3 - Action (Score 1 – 4 for each assessment indicator, then the overall principle average)							
Assessment Indicator	Parameters for Level 1 (a non achieving Partnership)	Score				Parameters for Level 4 (a high achieving Partnership)	Relevant Issues
	Weaknesses and Areas for Improvement	1	2	3	4	Strengths	
IIP 8 - Managers are effective in supporting the development of people	The Partnership finds it difficult to demonstrate that their managers are effective in supporting the development of their people		X			The Partnership makes sure that managers have the knowledge and skills they need to develop their people and managers at all levels understand what they need to do to support the development of people.	16 - Leadership Style 43 - Staff Development 44 - Leadership Development 46 - Performance Appraisal 93 - Responsibility Response 95 - Management Support Response
				X		The Partnership's people understand what their manager should be doing to support their development and they can describe how their managers are effective in supporting their development.	
			X			Managers at all levels can give examples of actions that they have taken and are currently taking to support the development of people	
			X				
	The Partnership has never trained its managers in people management skills and providing appropriate support in personal development to individual members of staff by managers is variable. An area for improvement is to provide training in people management skills for managers					Although the Partnership has not trained its managers in providing personal development support for individual members of staff most managers provide ad hoc advice from time to time, particularly when undertaking formal performance assessments Staff surveys show that most people consider that their manager provides personal development support	



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

Illustrative information in Workbooks which directly address quality indicators

Outcome 4							
Making a positive contribution							
Ofsted/ JAR Quality Statement	Score				Related Excelsior Connexions quality statements	Current Strengths Strong Evidence to Report	Areas for Improvement Evidence to demonstrate improvement
	4	3	2	1			
4.1 Children and young people are supported in developing socially and emotionally					75 – Personal Education 76 - Experience	<p>A particular focus of the Partnership's work is training PA's to identify where young people need guidance and support on their social skills and emotional behaviour.</p> <p>Relationships are in place with many agencies to which young people can be referred if they need to develop their social skills or would benefit from experiences which would develop their emotional behaviour</p> <p>PA case notes on referrals Referral register</p>	<p>More relationships need to be established, e.g. Fire and Rescue Services re reduction in arson by young people and Youth Clubs</p>



Training Pack - Action Point information to enter

Overarching Objectives and Introduction Notes

Improvement Action Point (what we plan to do)	Success Indicators	Responsibility	Assess & Review Dates	Last Progress Report (with date)	Deadline / Done Dates	Excelsior Ref. and Issue Heading
Review the impact of Partnership achievements against agreement terms.	Document reviewing the impact of Partnership achievements against agreement terms.	Performance Manager	01 April 2004	1 November 2003 Research being carried out to establish Partnership achievements against agreement terms to be complete November 2003.	01 December 2003	125.1 – Partnership Influence* ***
Implement Partnership agreements for key youth and community organisations.	Partnership agreements in place for key youth and community organisations	Performance Manager	01 December 2004		01 October 2004	50.1 – Partnership Agreements* ***
Identify other successful tools with partners and other Partnerships.	Report of research into tools used by others	YP Engagement Manager	01 December 2003	10 October 2003 Project completed with documents and report October 2003	01 July 2003 01 October 2003	23.2 - Young People's Needs* ***

Mini Plan = Partnerships

Key Objectives - Performance Report

Organisation		Red	Red as defined
		Amber	Amber as defined
Report dated	[date]	Green	Green as defined

Key Objective Performance Report Overview

Authors narrative comments

No.	Objective Measures	Targets	Baseline Performance	Responsibility	Last 4 Period Performance Strengths	Areas for Improvement Notes
3.1	Increase participation of young people in learning, especially those in targeted groups with a 12.5% reduction in the NEET rate over 2 years No. and % in NEET Category	Green Under 11.5% Amber 11.5% to 13.0% Red Over 13.0%	Average for fiscal year 2004/ 2005 was 11.7%	WH	Amber Amber Amber Green The NEET rate is now 10.21% as against the green target of 11.5%.	Improve information from Colleges and Schools re drop outs and truancy Problems still exist in managing the 'not knowns'
3.2	Engage young people in the 'hardest to reach' groups in the Connexions Service with a 5% reduction in no. of 16 - 18 yr olds not known	Green Under 5% Amber 5 - 7% Red Over 7%	Average for fiscal year 2004/ 2005 was 6.52%	WH	Red Red Red Red	Identify how others are addressing this problem and implement improvement action in the immediate future The planned 5% reduction is, currently, a 100% increase and the Partnership is reporting 12.44%