



# SCOREBOOK NAVIGATOR™ MANUAL TEAM LEADER

Please note that the Scorebook Navigator User Manual attached is provided by the Rocky Mountain Performance Excellence Program, which owns the software system. In some instances, the processes described do not follow TNCPE's instructions for Independent Review or Consensus Review.

Please use this manual as a reference to troubleshoot issues with Scorebook Navigator or to better understand its functionality. However, please continue to use the Examiner Resources on TNCPE's website (such as the **Team Leader's Guide**) for step-by-step instructions on leading your team through Independent Review and Consensus Review in Scorebook Navigator.

As always, don't hesitate to contact the TNCPE office with your questions.



# Scorebook Navigator™

## Team Leader Manual

Version 8.2014

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# Scorebook Navigator™ Team Leader Manual

To facilitate team management, examiner team leaders have access to a few additional tools through the *Scorebook Navigator™* software.

Team leaders will use these capabilities to make assignments, compile team findings and guide examiners through the independent review and consensus processes.

## Logging in

If you are a team leader, the state quality award program office will set up your *Scorebook Navigator™* account with access to the team leader tools, along with the scorebook tools you will use for your own independent review and consensus assignments.

To log in, use the same username and password you set up when you started your pre-work assignment.

## Accessing the Team Leader Tools

After you log in, *Scorebook Navigator™* will open to the **Scorebooks** page. Click on your assignment link. When the assignment opens you will see a new **Team** Tab on the menu bar, in addition to the tabs you used during your pre-work assignment (and will use again during your team's application evaluation).

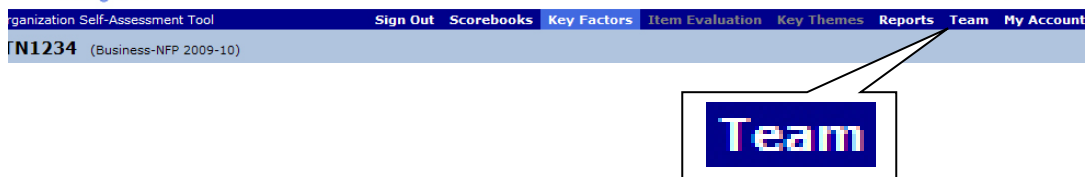


FIGURE 1 – Team leaders will find a new Team Tab on the menu bar when they open their assignment in *Scorebook Navigator™*.

## The Tools Screen

When you click on the **Team** Tab, a screen will open that contains team leader tools. Your team members do not have access to this screen. The tools are linked on a navigation column down the left-hand side of the screen.

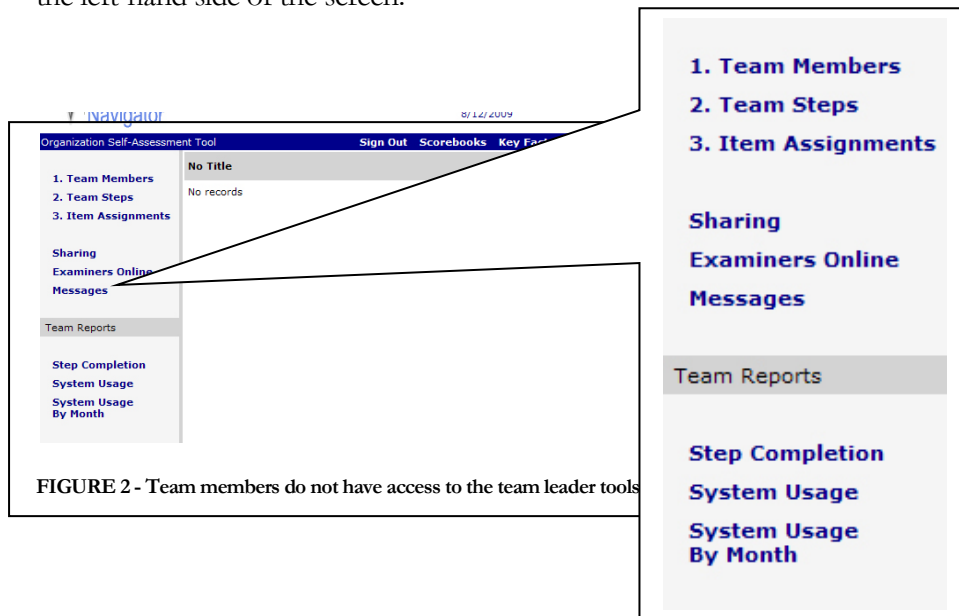


FIGURE 2 - Team members do not have access to the team leader tools

## Using the Team Leader Tools

Each of the team leader tool links opens to its respective tool screen.

The tools will be integral to your team's work, or at least very handy. The following is a description of each tool's function.

### Team Members

This screen provides a list of team members and their contact information. It includes the capability to e-mail team members individually or the whole team as a group.

The screenshot shows the 'Team Members :: Applicant Scorebook' screen. It features a navigation menu on the left and a table of team members. The table has columns for 'Examiner/Mentor/Advisor/Judge', 'Team Leader', 'Read Only', and 'Assigned Items'. There are three rows of team members listed.

Examiner/Mentor/Advisor/Judge	Team Leader	Read Only	Assigned Items
<a href="#">A. TeamMember</a> 555-222-2222			1.1 1.2
<a href="#">B. TeamMember</a> 555-333-3333			2.1 2.2
<a href="#">Name, TL</a> 555-111-1111	Yes		KF KT

FIGURE 3 - The Team Members Screen provides a contact list. Use the "Assigned Items" column as a quick reference to team members' assignments. (This last column will not appear until the team is in Consensus.)

The link under each member's name will generate an e-mail to that examiner. Send an e-mail to the whole group by clicking the **Email Whole Team** link, located above the list of team member names.



The Award Program office will activate Step 1. The team lead will apply all following Steps.

(There are two process flow options available for the examination process; Key Factors can be consolidated as the first step in the Independent Review process or as the first step of the Consensus process. In this manual, Key Factor consolidation as the first step in Independent Review used for illustration. The same principles apply to both options.)

Once all team members completed the assigned task for Step 1 (they will indicate completion by checking the box labeled **Done** next to their assignment on the Scorebook Screen), the team leader will be able to move the team on to Step 2.

**Note**

When an examiner marks their scorebook Done, it becomes Read Only. However, up to the time that the Team Lead applies the next step, the examiner can remove the Done check and reopen their scorebook for changes.

Team leaders advance the team to the next step by pressing the **Apply** button under the status column. Once **Apply** is activated, team members will lose the ability to make changes in earlier steps. They will retain read-only access to their previous work, however.

The team leader can only advance the team to the next step after all the examiners have checked the Done box located on the Scorebook Screen next to their assignment. **Tip: You can monitor your team's progress using the Step Completion Screen, described on the next page.**

When a team leader presses the "Apply" button, it cannot be undone without intervention by the *Scorebook Navigator*™ Administrator (someone outside the Program office).

## Item Assignments

The team leader uses this screen to make specific assignments to team members for the consensus process.

Item	Examiner/Team Member	Backup
KF Key Factors	Frazier, Jennifer	Schoch, Will
KT Key Themes	Frazier, Jennifer	Frazier, Jennifer
1.1 Senior Leadership		Frazier, Jennifer
1.2 Governance and Societal Responsibilities		
2.1 Strategy Development		

Item	Examiner/Team Member	Backup
KF Key Factors	Frazier, Jennifer	Schoch, Will

FIGURE 5 - You will use the Item Assignments Screen to delegate tasks to your teammates. Simply select team member names from the drop-down menus.

Each row contains an assignment and examiner drop-down menus. Use the menus to select an examiner and back-up for each assignment (Item synthesis, Key Factors or Key Themes). When you do this, the team members you select will have write/edit access to their assigned Item(s). The rest of the team will have read-only access.

Press the **Save** button at the bottom left of the screen when you're finished making assignments.

The Item Assignments Screen can be modified to provide a scorebook editor write/edit privileges to the entire scorebook. This may come in handy if you decide that one examiner will record all the scorebook updates for the team during the consensus meeting.

To give a scorebook editor full write/edit access, reassign each Item to your designated scorebook editor. When you do this, Item leaders will have read-only access to their work. Write/edit access can be reapplied to any examiner at any time.

## Sharing

The sharing function is used to allow team members to see the scorebooks of other team members. The Award Program may provide guidelines for its use. Possible uses include

- sharing can be used by Team Leads or Read Only team members to provide feedback to other team members;
- sharing can be used to allow consensus on Key Factor consolidation. After the Key Factors are consolidated, the Key Factor consolidation scorebook is shared with all other team members;
- sharing can be used to allow Read Only team members to view the independent review scorebooks.

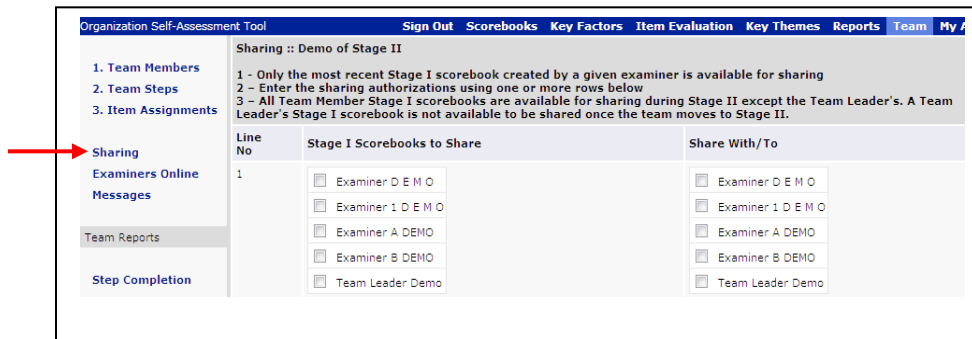


The team lead selects the scorebooks to be shared and the team members that the scorebooks will be shared with.

The page is organized into working cells like other pages in the Scorebook Navigator. The cells contain rows of active workspaces under two column headings called “Stage I Scorebooks to Share” and “Share With/To”.

The Stage I Scorebooks to Share column is where the Team Leader selects the team member whose scorebook is to be shared.

The Share With/To column is where the Team Leader designates the team member(s) who will have read only access to the team member scorebook selected in the Stage I “Scorebooks to Share” column.



1. Click in the first working cell to see your team members' names preceded by a check box under each of these columns.
2. Select the first team member whose scorebook you wish to share with other team members.
3. Select the team members to be assigned read only privileges from the “Share With/To” column. (Exclude the examiner(s) whose scorebook is being shared.)
4. Save your work by clicking on the “Save button at the bottom of the page

## **Examiners Online**

This screen provides reports on team members who are currently using *Scorebook Navigator*™, or who have used the software within the past 30 minutes.

## **Messages**

This screen allows team leaders to leave messages for team members on the *Scorebook Navigator*™ system. Team member will receive the message the next time they log on to the software.

## **Team Reports**


As the team leader you have access to several team reports that are also accessible via the **Team** Tab:

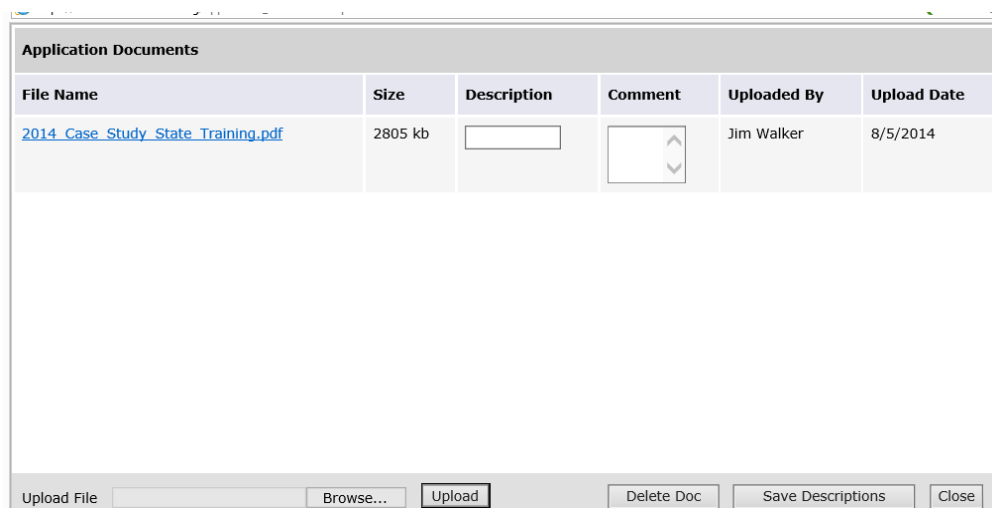
**Step Completion** – This screen serves as a dashboard where you can monitor each team member's progress. It provides a summary of each examiner's Stage 1 and 2 assignment data, which includes Key Factors, Key Themes, Key Factor References, ADLI/LeTCI observations, gaps, notes and Items scored.

**System Usage** – This screen generates a report that identifies the amount of time team members have spent logged on to the *Scorebook Navigator*™ tool. Usage metrics are broken out by task. (This report will take some time to complete.)

**System Usage by Month** – This screen generates a report that identifies the amount of time team members have spent logged on to the *Scorebook Navigator*™ software, aggregated by month. (This report will take some time to complete.)

## Uploading Application Documents

The Team Leader can upload application documents that can be downloaded by team members. This is accomplished by clicking on the “Display the Application” icon, . A window will open as follows:



File Name	Size	Description	Comment	Uploaded By	Upload Date
<a href="#">2014 Case Study State Training.pdf</a>	2805 kb	<input type="text"/>	<input type="text"/>	Jim Walker	8/5/2014

Upload File  Browse... Upload Delete Doc Save Descriptions Close

To upload a document, click on the Browse button to locate the document on your computer. Then click Upload. You may add a description and comment, if you like.

To delete a document, select it in the window and click the Delete Doc button.

When multiple documents are available to the team members, this window will open with all application documents listed. The team members will click on the document they want to download it. Team members who are not team leads will not see the bottom line that allows upload.

## Consolidating Key Factors

The Team Leader will select one team member to consolidate the Key Factors. The remaining members will wait while this consolidation takes place.

After the Team Lead moves the team into the Key Factor Consolidation Step, the person assigned to perform the Key Factor consolidation will find a new scorebook on their scorebook page with the instructions to “Consolidate Key Factors”. Opening the new scorebook will take the team member to the Key Factors section.

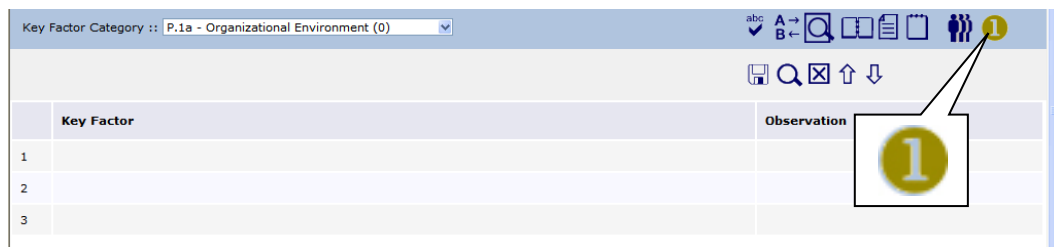
If Key Factors are consolidated prior to Independent Review, the key factors from all team members will be accumulated on each Key Factor page (P1a, P1b, P2a, P2b, P2c). The key factors will be consolidated by deleting rows containing redundant key factors and editing the remainder to incorporate all team key factor content.

After the consolidated key factors are saved, an observation box opens beside the Key Factors. This observation box can be used by other team members to record feedback on the key factors. After the consolidation is complete, the team lead may share the scorebook with the remainder of the team to allow them to review and comment on the consolidated key factors. To provide feedback, a team member types in the observation box and then clicks on the Add button to save the feedback. (NOTE: the Add button must be clicked to save the observation. If the Save icon is clicked before the Add button is clicked, the observation will not be saved.)

	Key Factor	Observation
1	1st Key Factor	<input type="text"/> <input type="button" value="Add"/>
2	2nd Key Factor	<input type="text"/> <input type="button" value="Add"/>
3	3rd Key Factor	<input type="text"/> <input type="button" value="Add"/>

After the Key Factor consolidation and review is completed, the consolidator makes the scorebook as Done and the Team Lead moves the team into the next step

If Key Factors are consolidated at the first step of consensus, the Key Factors from all of the team member's independent review scorebooks are accumulated and made available by clicking on the Show Stage 1 Data icon (one in a golden circle).




	Key Factor	Observation
1		
2		
3		

Clicking on this icon will open a section above the Key Factor section. This section will list the key factors selected by each team member. It will initially be sorted by Examiner. The list can be sorted by Key Factor by clicking on the Key Factor column title. (Notice that the examiners initials are automatically appended to the Key Factor.)

Examiner	Key Factor
A TeamMember	1st Key Factor [TMA]
A TeamMember	2nd Key Factor [TMA]
A TeamMember	3rd Key Factor [TMA]
B TeamMember	Key Factor 1 [TMB]

	Key Factor	Observation
1		
2		
3		

The list can be exported by clicking on the  icon. The list will open in a second window; either column can be sorted in this window. To print out this list, use your browser print command, or right click in the report, select all, then copy and paste into a Word document.

Examiner	Key Factor
A TeamMember	4th Key Factor [TMA]
A TeamMember	5th Key Factor [TMA]
A TeamMember	6th Key Factor [TMA]
B TeamMember	Key Factor 4 [TMB]
B TeamMember	Key Factor 5 [TMB]
B TeamMember	Key Factor 6 [TMB]

The consolidating team member will identify all the unique key factors and copy them from the gold section to the gray section of each Key Factor page. The intent will be to capture all unique key factors. To move the key factors from the gold section to the gray, open a row in the gray section, then drag and drop the desired key factor from the gold section to the open box. The key factor may be edited after being moved. Be sure to save often.

Examiner	Key Factor
A TeamMember	1st Key Factor [TMA]
A TeamMember	2nd Key Factor [TMA]
A TeamMember	3rd Key Factor [TMA]
B TeamMember	Key Factor 1 [TMB]
B TeamMember	Key Factor 2 [TMB]
B TeamMember	Key Factor 3 [TMB]

	Key Factor	Observation
1	<div style="border: 1px solid gray; padding: 5px;"> <div style="border-bottom: 1px solid gray; margin-bottom: 5px;">1st Key Factor</div> <div style="font-size: small; color: gray;"> <span>✂</span> <span>📄</span> <span>🔍</span> <span>🔗</span> <span>🔖</span> <span>🔍</span> <span>🔗</span> <span>🔖</span> </div> </div>	