

A. Start a Pre-Conference

1. Click **Observations**.
2. Click **Pre/Post Conferences**.
3. Click the **Create New Pre/Post Conference** button.
4. Select a Questionnaire from the drop down menu.
5. Choose the **To Be Completed By**, either, “I’m creating this questionnaire for someone else to complete.” or “I’m creating this questionnaire for myself to complete.”
6. **Locate** the participant’s name in the list.
7. *Optional:* You may page or search to find the name in the list.
8. Click **Add** to select the participant.
9. Click **Next**.
10. If you are completing the questionnaire, type or choose a response to the first question.
11. *Optional:* Repeat step 10 for additional questions.

Note: For your security, iObservation has a time limit for inactive users. If you are inactive for more than 60 minutes, you will be logged out. After 55 minutes of inactivity, you will be prompted to verify that you want to stay logged in. If you do not confirm within 5 minutes you will be logged out and any unsaved data will be lost. Confirming that you wish to remain active and logged in will not automatically save your work, but will allow you to continue and save without any loss of data.

See **Finish a Pre-Conference** for steps on how to finish the questionnaire.

B. Edit a Pre-Conference

1. Click **Observations**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre-Conference in the list.
4. *Optional:* You may reorder, search and/or filter to find the Pre-Conference in the list.
5. Click **Continue**.
6. Type or choose a response to a question.
7. *Optional:* Repeat step 6 for additional questions.

See **Finish a Pre-Conference** for steps on how to finish the questionnaire.

C. Finish a Pre-Conference

1. Click **Observations**.
2. Click **Pre/Post Conferences**.
3. **Locate** the Pre Conference in the list.
4. *Optional:* You may reorder, search and/or filter to find the Pre-Conference in the list.
5. Click **Continue**.
6. *Optional:* Type or choose a response to a question.
7. *Optional:* Repeat step 6 for additional questions.
8. *Optional:* Type additional comments in the Overall Comments text area.
9. Click **Finish**.
10. Click **Yes**.

D. Start a Post Conference

See **Start a Pre-Conference**

E. Edit a Post Conference

See **Edit a Pre-Conference**

F. Finish a Post Conference

See **Finish a Pre-Conference**

G. Conduct an Observation with Imported Evidences

Note: This functionality is dependent upon the form assigned. Some forms do not include import evidence functionality.

1. Click **Observations**.
2. Click **Conduct**.
3. **Locate** the learner's name in the list.
4. *Optional:* You may reorder, search and/or filter to find the name in the list.
5. Click the **Forms** button.
6. Select a **Form** from the drop down menu.
7. *Optional:* Set a default form by clicking Select Default Form and choosing a form from the drop down menu.
8. *Optional:* Once the default is set, skip steps 5-6 by clicking Begin.
9. The **Table of Contents** appears.

10. *Optional:* Change the learner's location using the drop down menu. If the learner is in only one building, the observer does not need to make a selection.
11. *Optional:* Select the button to indicate that the observation is formal, informal or a walkthrough.
12. *Optional:* Check the checkbox to indicate if the observation "Counts towards Annual Evaluation".
13. Click the **Add Pre/Post Conferences** link.
14. Click the **Select** link to select one or more Pre or Post Conferences.
15. Click **Close**.
16. Click a look-for in the list to begin collecting data.
17. Add data to the form by typing comments, adding information, etc.
18. Add evidences to the form by clicking the **Add** link.
19. Click the **Select** link to select one or more notes or questionnaire responses to include.
20. Click **Close**.
21. *Optional:* Repeat steps 18-19 to add additional questionnaire responses.
22. *Optional:* Add more look-fors by repeating steps 16-21 by either clicking Back to Table of Contents or opening the Form Map.
23. *Optional:* Click Cancel to exit the observation without saving.
24. *Optional:* Click Save and Close to save a draft of the form then return to the Conduct list view.
25. *Optional:* Click Save Draft to save the observation and edit at another time.
26. *Optional:* Send a notification email to the learner.
27. *Optional:* Type and additional message.
28. Click **Finish** to end the observation. Completed observations are not editable.

H. Continue a Saved Draft Observation

See **Observation Quick Start Guide**.

I. Share a Pre/Post Conference

See **Share and Collaborate Quick Start Guide**.

J. View a Shared Conference

See **Share and Collaborate Quick Start Guide**.