THE ALLIANCE FOR PERFORMANCE EXCELLENCE

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Scorebook Navigator™

Stage 1 Independent Review
User Manual

Version 9.8.2010
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Chapter

1

Getting Started

The *Scorebook Navigator*™ software was licensed by the Alliance for Performance Excellence to facilitate the evaluation process for state-level Baldrige program examiners.

The software will help you organize and share your findings. It will streamline both independent review and the consensus process.

As with all software applications, *Scorebook Navigator*™ is a work in progress. Please help us continue the improvement cycle by contacting the TNCPE office (contact@TNCPE.org) with the OFIs (and best practices!) that you encounter.

Browser Requirements

Scorebook Navigator™ has been approved for use with the following browsers:

- Internet Explorer 6.0 or later
- Firefox 5.0 or later
- Safari 4.0 or later

If you log in to *Scorebook Navigator*™ with a different browser you will receive a warning that the application may not work properly unless using you are using one of the approved browser versions.

Several settings on internet browsers need to be set appropriately for the *Scorebook Navigator*™ software to run properly.

1. Java needs to be enabled
2. Popup windows should not be blocked
3. Temporary files should be deleted
4. Browser cache should be set to maximum (usually 1024 MB)

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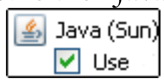
Internet Explorer

1. Enable Java
    a. In Explorer 8.0 in the menu bar click on "Tools" and then "Internet Options."
    b. Open the advanced tab and scroll down to the Java setting to make sure the "Java (Sun)" setting is checked.
    

2. Unblock popup windows
    a. In the same internet options window, open the "Privacy" tab and uncheck the "Turn on Pop-up Blocker" item.
3. Delete temp files
    a. In the same internet options window, open the "General" tab and click on the "Delete…" button in the Browsing history section.
    b. Select all the options. "Preserve Favorites website data" can remain unchecked. Make sure these items are check marked for deletion: Temporary Internet files, Cookies, History, Form data, Passwords, InPrivate Filtering data.
    c. Then click the "Delete" button.
4. Increase browser cache
    a. In the same internet options window, in the general tab, in the browsing history section, click the "Settings" button to open the Temporary Internet Files window.
    b. Increase the "Disk space to use" to the maximum, i.e. 1024 MB.

Safari

1. Enable Java and Javascript and unblock popup windows
    a. In Safari 5.1 click on the tools wheel on the right side of the location bar and select preferences.
    
    b. Open the security tab and make sure "Enable Java" and "Enable Java Script" setting are checked and uncheck "Block pop-up windows."
2. Delete temp files
    a. In the same preferences window, open the "Privacy" tab and click the button at the top that says "Remove All Website Data…"
3. Increase browser cache
    a. In the same preferences window, open the "Advanced" tab and increase the default space for database storage to the maximum setting, i.e. 500 MB.

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Firefox

1. Enable Java and Javascript and unblock popup windows
    a. In Firefox 5.0 in the menu bar click on "Tools" and then "Options."
    b. Open the content tab and make sure "Enable Java Script" setting is checked and uncheck "Block pop-up windows."
2. Delete temp files
    a. In the same options window, open the "Privacy" tab and click the link that says "clear your recent history."
    b. In the next window, in the "Time range to clear" drop down menu select "Everything." In the details area check all items to clear, i.e. Browsing and download history, form & search history, cookies, cache, active logins, and site preferences.
    c. Then click "clear now."
3. Increase browser cache
    a. In the same options window, open the "Advanced" tab and check the box that says "Override automatic cache management" and set the cache limit to the maximum, i.e. 1024 MB.
    b. Then click "ok."

Logging in

When you log in for the first time, follow the steps below. If you already logged in during training to complete your pre-work in *Scorebook Navigator*™*,* your account information (username and password) will remain the same during an actual evaluation.

1. Go to https://scorebook.baldrigepe.org

2. Input your username. Your username will be based on this format: TNLastnameFirstinitial. Example: Michael Scott = TNScottM

3. Input your password. Tncpe123! is the default password. Please note the password is case sensitive and the "!" is part of the password.

4. On the Terms of Use Screen click on the accept button for access authorization. This limits your use of the *Scorebook Navigator*™ to award program purposes – not for your personal or business use.

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Setting Up Your Account

After your initial login, you will to taken to the My Account screen and required to change your password. Your new password must contain at least 8 characters, with upper and lower case letters, plus at least one number or character. While you are on this page, take a moment to customize your *Scorebook Navigator*™ account.

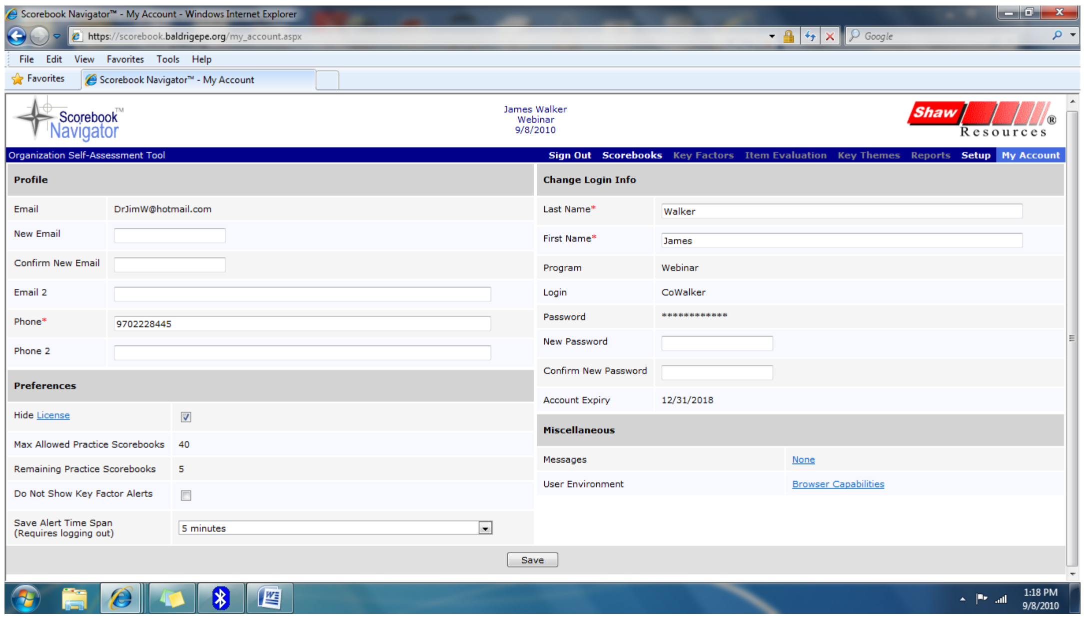

FIGURE 1 - My Account Screen.

1. Click **Browser Capabilities** (bottom right) to determine if any of your browser settings need to be changed. (Click the back arrow on your browser to return to the My Account Screen.)

2. Add or correct your contact information.

3. There is a save reminder feature that will remind you to save your work after a set time without a save. The default is 5 minutes, but this can be modified to 10, 15 or 20 minutes, using the drop down box in the lower left of the My Account page. The drop down also allows you to turn the save-alert feature off.

4. There is an additional selection on this page that allows you to turn off Key Factor alerts. These alerts remind you that deletion of a key factor from the key factor list will also delete it from the Item Evaluation pages. Turning this alert off is particularly useful for the team member who is consolidating key factors.

5. Click the **Save** button at the bottom of the screen to record your changes.

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Find Your Scorebook

To access your assignment, click on the **Scorebooks** Tab (found on the menu bar, see page 4). Once open, you will see a link to your assignment under the "Scorebooks" column heading.

Pre-work scorebooks are labeled "2012 Tillingate Living Pre-Work Group __." When you are assigned to an actual application the scorebook will be labeled TN and the applicant number.

OFI Alert
Under the "Assignment" column next to your pre-work assignment, you are instructed to check the "**Done"** box when you finish. After you click the "Done" box, you will be asked to confirm. While this box is checked, no further changes can be made to your scorebook.

If the team has not been moved into the next step of the process, you can re-click the "Done" box and restore your ability to make changes.

All team members must click "Done" before the software allows the team to move forward.

If your scorebook does not appear on the Scorebooks Screen, or fails to open when you click the link, please contact the TNCPE office: contact@tncpe.org or (800-453-6474).

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Chapter 2

Stage 1 – Independent Review

Now that you're set up in the system, you can familiarize yourself with the *Scorebook Navigator* ™. These instructions will take you through some of the features and get you ready to begin your independent review.

Scorebooks Screen & Menu Bar

At the top of each page in *Scorebook Navigator*™, you will see a menu bar that includes these tabs:

- Sign Out
- Scorebooks
- Key Factors
- Item Evaluation
- Key Themes
- Reports
- My Account

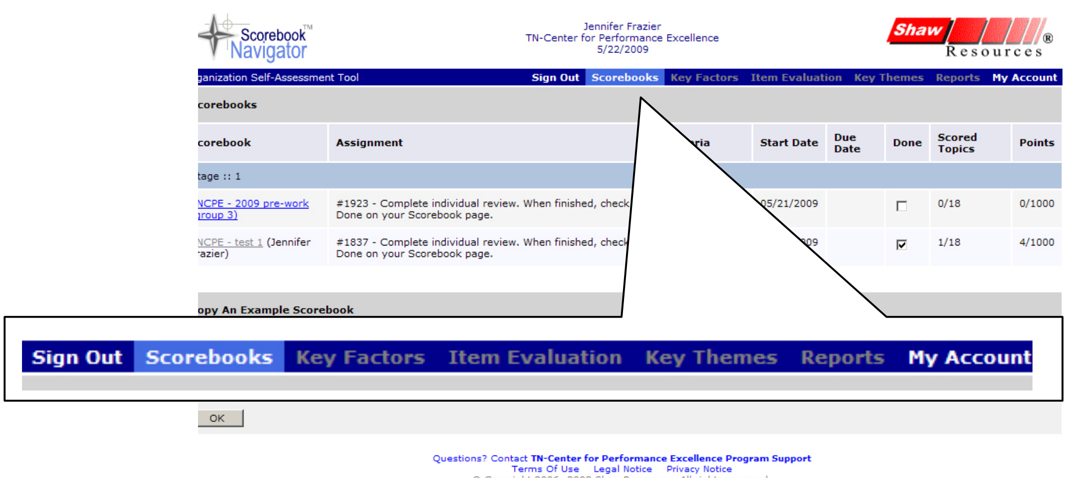

FIGURE 2 - Scorebooks Screen and detail of menu bar.

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Access your scorebook

From the Scorebooks Screen, you can access the scorebook that you will fill in as you complete your assignment. A nice feature of the software is that this scorebook automatically corresponds with the Criteria you need for your evaluation (Business, Education or Health Care).

Click the blue highlighted text to open your scorebook.

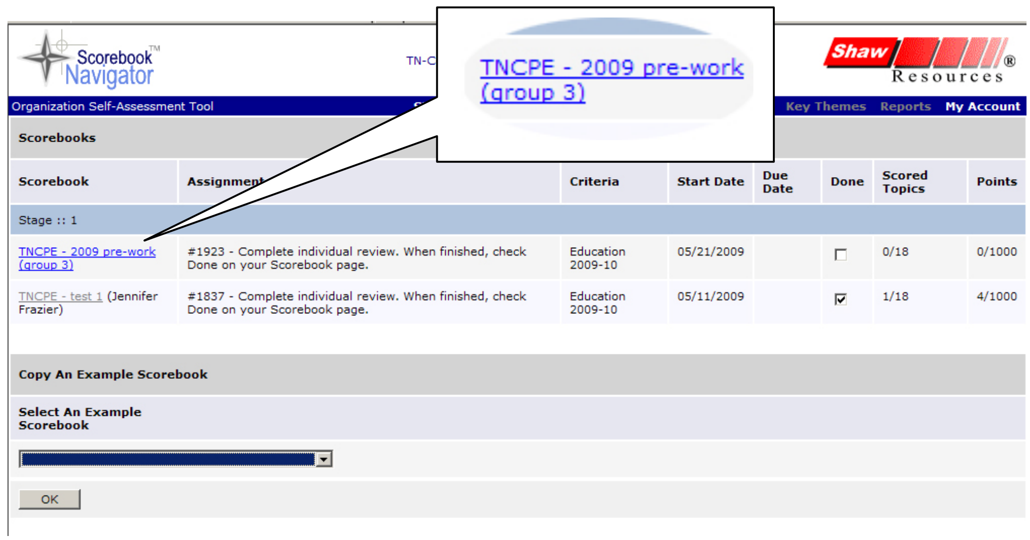

FIGURE 3 – Accessing your scorebook is easy. Just click the appropriate link in the "Scorebook" column.

Scorebook Navigator™ Tools

At the top of the Key Factors, Item Evaluation and Key Themes Screens, you'll see a series of symbols. These are tools that will help you write your evaluation. You will probably be familiar with some of these tools, as they're similar to features included in word processing software.

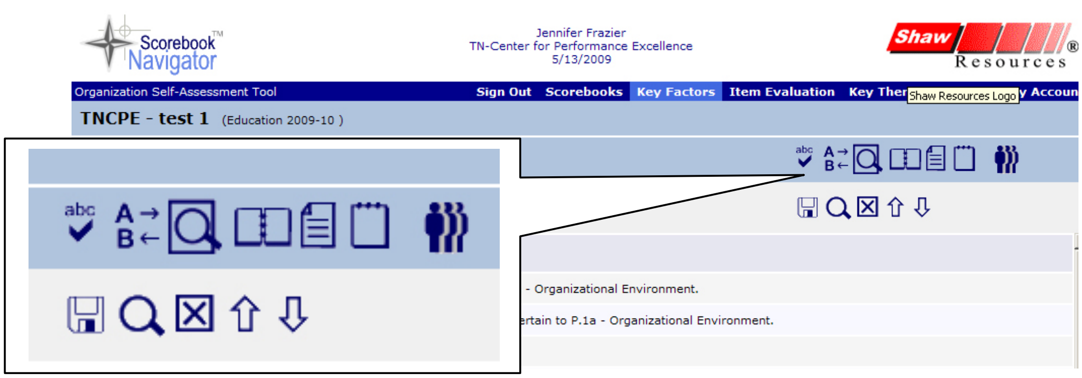

FIGURE 4 - A toolbox of helpful icons will help you write your evaluation.

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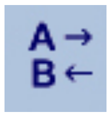
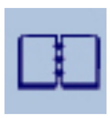
Glossary of Tools

Spell Check. The spell check will only review what is included on the open screen – it will not check spelling for the entire evaluation.



Find & Replace Text. This works like the MS Word tool.

Print Preview. Creates a printer-friendly version of what you see on the screen you're working on.



Display the Criteria. This tool displays the Criteria assigned to your scorebook. If needed, wording from the Criteria can be copied and pasted into the data entry fields you will fill out.

Display the Application. This tool is not available to TNCPE examiners.*

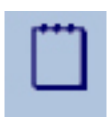
Save. This icon is your best friend. Click it frequently to save your work. The icon will turn red if the Save-Reminder time has expired.

Pop-out data entry area Field. Opens the data entry field in a new window for improved viewing.

Delete Row. Deletes row of text in a data entry field.

Move Row Up. Moves up a row of text in a data entry field.

Move Row Down. Moves down a row of text in a data entry field.



Record notes and action items. This screen can be used as a log of action items that need resolution or discussion. It includes some handy tools that can help you fill out the fields, like a calendar for determining due dates and a drop-down menu you can use to tag action items as "close," "open" or "parking lot."

*To protect our applicants' proprietary information and the integrity of the TNCPE evaluation process, we do not make applications available in electronic format.

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Key Factors Screen

Your first step of independent review is to draft a list of key factors. The Key Factors Screen allows you to document key factors, which will later be linked to your Item evaluation as you complete that portion of the scorebook.

The first time you open your scorebook, the Key Factors Screen will appear. You can also access the Key Factors Screen by clicking **Key Factors** on the menu bar.

Use these **Key Factors** Fields to type in each Key Factor.

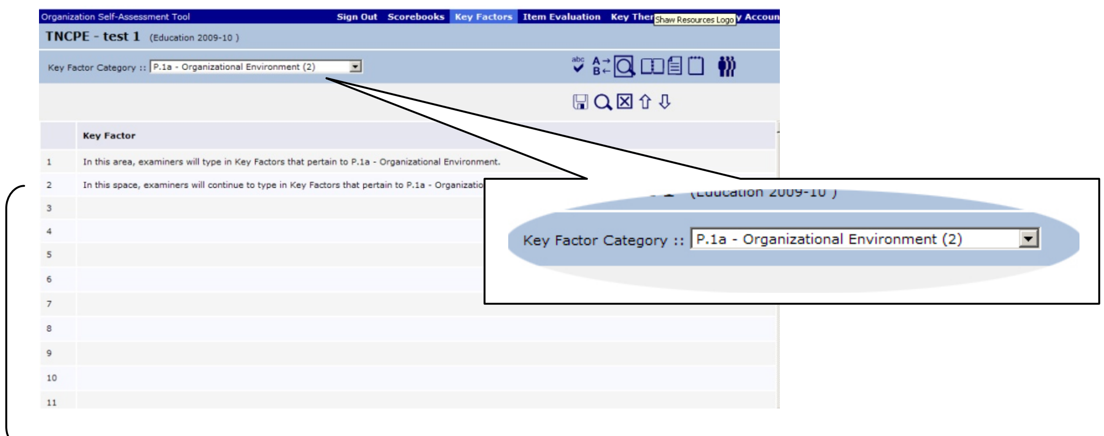

FIGURE 5 - Use the Key Factors Screen to document the applicant's key factors. Note the drop-down menu that allows you to record key factors according to the Organizational Profile's Areas to Address categories.

Key Factors Fields

The lines you see on the screen are data entry fields. Use them to record key factors. After you enter your first key factor, click on the field below to add the next one.

Save Frequently!

It's important to click the **Save** icon before leaving the Key Factors Screen. You must save before you move to another area on the Key Factors Screen, and before clicking any other tab. Otherwise, your work will NOT be saved.

In addition, since the data is saved using the internet, there are many ways to lose your connection to the database. When this occurs, any information you have entered into your scorebook since the last time you saved will be lost.

Scorebook Navigator™ has a Save-Reminder feature. After working on a page for a fixed time (5 minutes is the default), the white lines between rows and columns will briefly flash blue and the **Save** Icon will turn red. You can continue to work while the icon is red, but should save as soon as practical. (On the My Account page, in the lower left corner, you can adjust the reminder time to 5, 10, 15, or 20 minutes; you can also turn the reminder off).

Save Frequently!

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Key Factors Areas to Address

A drop-down menu on the screen (highlighted in Figure 5) allows you to record key factors according to the Organizational Profile's Areas to Address. The menu options are:

- P.1a. Organizational Environment
- P.1b. Organizational Relationships
- P.2a. Competitive Environment
- P.2b. Strategic Context
- P.2c. Performance Improvement System.

Key Factors Screen Tips

As long as you save your work, you can return to any of your key factors to edit or add information prior to clicking the "Done" box on the Scorebook Page.

During an actual evaluation, your team leader or scorebook editor will then consolidate the team's key factors and load them into the software. Later, when you do your item evaluation, this consolidated list of key factors will be automatically linked to the rest of your scorebook. This makes it easy to reference the key factors when evaluating each item. However, this step is omitted during pre-work.

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Item Evaluation Screen

The Item Evaluation Screen records your analysis of the applicant's response for each item. It's made up of two important components: the **Item Field** and the evaluation sections.

You can access the Item Evaluation Screen by clicking the **Item Evaluation** Tab on the menu bar after you open your scorebook.

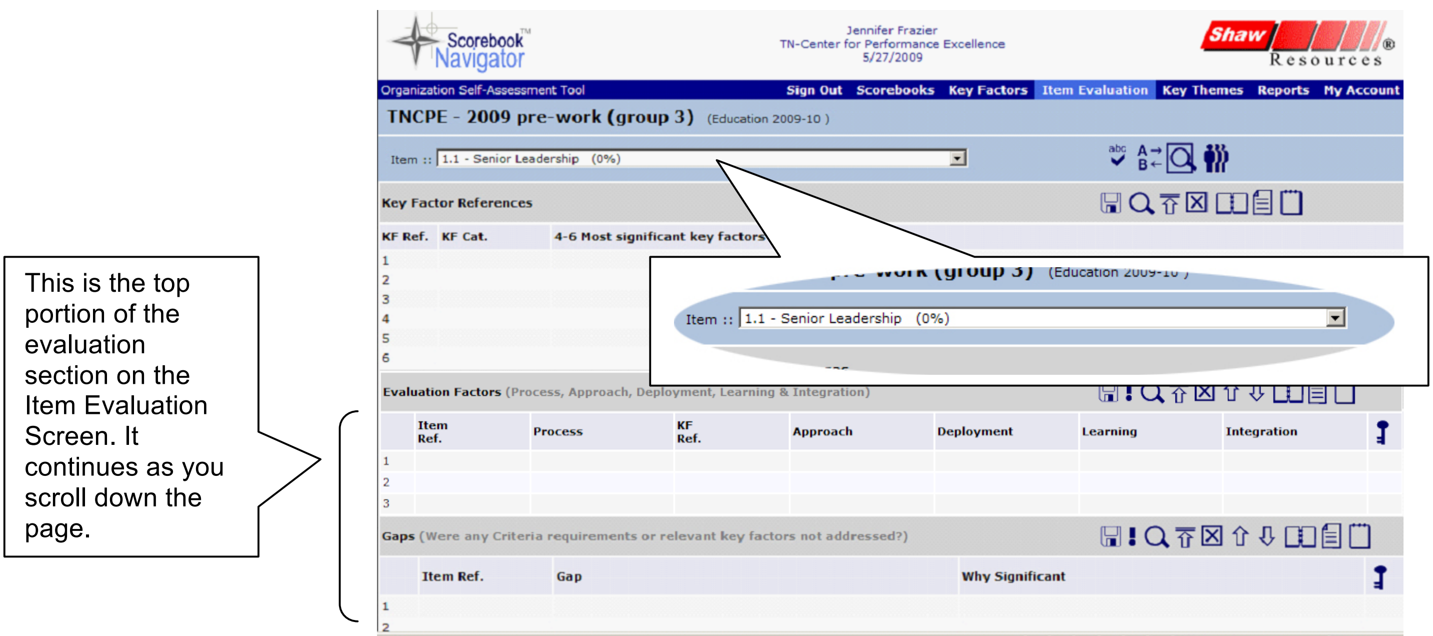

FIGURE 6 - This is the Item Evaluation Screen. Note the location of the Item Field (detail) and the evaluation sections (left).

The **Item Field** is a drop-down menu that allows the examiner to select the Item being evaluated.

The evaluation section is composed of five panels that you will use to complete each Item in your evaluation:

- Key Factor References
- Evaluation Factors
- Gaps
- Overall Item Notes
- Scoring

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Let's take a closer look at each of these panels.

Key Factors References Panel

The **Key Factors References** Panel helps you identify and record the four to six key factors that you will use to evaluate your applicant for each Item.

To use it, click on an empty field under the "four to six key factors (KF) for this Item" column. A drop-down menu will appear with the list of inputted key factors. Select the key factor that applies. (Only the first line of the key factor will appear in this dropdown; the full key factor will appear after selection). You can select any key factor that you believe is relevant to the Criteria Item requirements.

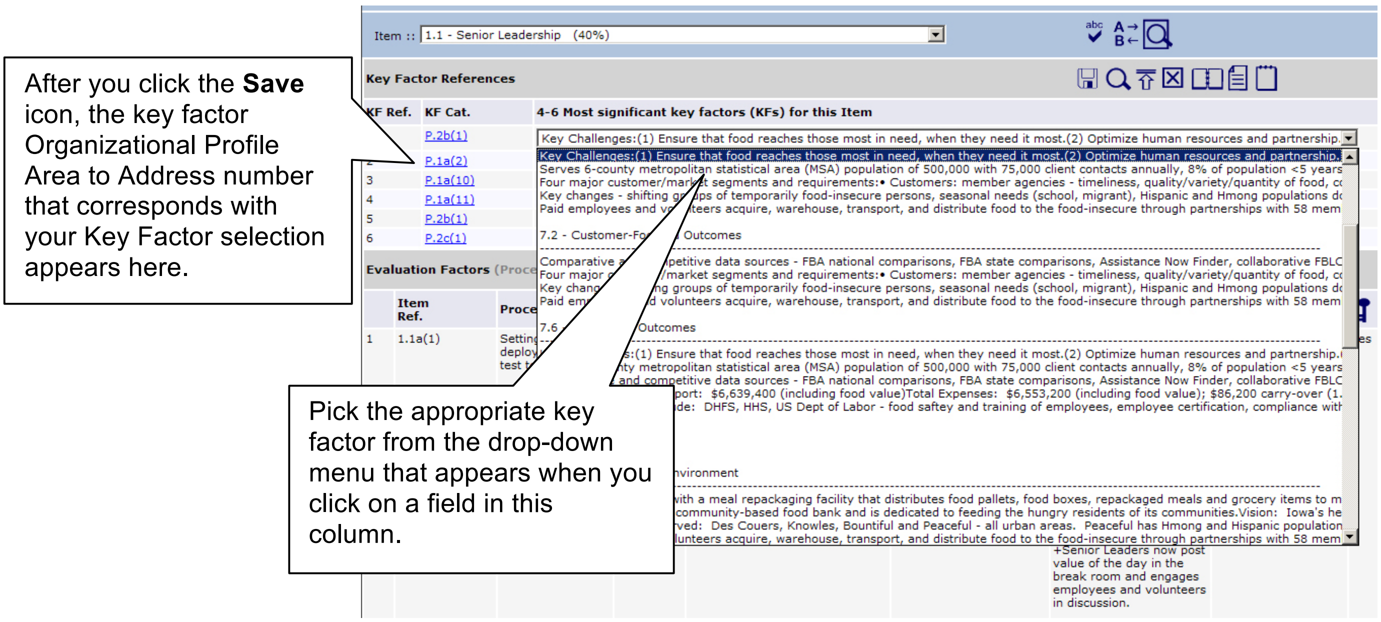


FIGURE 7 - The Key Factors Field will automatically populate with the key factor you picked from the drop-down menu. Also note, the key factor Organizational Profile Area to Address number that applies to your selection will appear in the "KF Cat." column after you click the Save icon. The number that follows the Area to Address number is the row number of the key factor; thus each key factor has a unique identifier number.

Save your work!
Be sure to click the **Save** icon after each key factor reference entry.

Evaluation Factors Panel

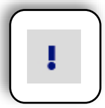
This section captures the ADLI (Approach, Deployment, Learning, Integration) evaluation factors for the processes described by the applicant for each item. As with other sections of the scorebook, you'll input data by clicking a field. The panel is divided into columns:

- **"Item Ref." column.** The appropriate item reference from the Criteria is checked on the Evaluation Factors Panel. Hover your mouse over the item to reference the Criteria requirements.

- **"Process" column. S**ummarize the Criteria requirements for the item you are evaluating and note the applicant's key processes, approach or methods that meet the requirements

- **"KF Ref." column.** Use this column to identify **t**he applicable key factors by putting a check-mark in the box next to the relevant key factors. Hover your mouse over the item number to see the key factor text.

- **"Approach, Deployment, Learning, Integration" columns.** Use these four columns to provide your observations of ADLI for the process. **Leave no empty cells – if one of the elements is missing, say so. Use "+" to identify potential strengths and "–" to identify potential OFIs.**



In the ADLI columns, identify observations that are particularly significant with bold-faced type. Activate bold-face type by highlighting the text you want to bold and selecting the **"!"** icon on the menu bar.

- **"Key Themes" column.** If you believe an observation may be related to a key theme, check the box in this column. **(NOTE: Identifying key themes is not required for pre-work).**

Save Your Work!
Save, save, save. We know we say it a lot. Any time you add or alter text in the Item Evaluation Panel, hit that **Save** icon.

Gaps Panel

This panel captures gaps between Criteria requirements and the processes or results described in an application.

As with other sections of the scorebook, you'll input data into the **Gaps** Panel by clicking a field. Use the field in the first column ("Gap") to describe the gap. Use the field in the second column ("Why Significant") to explain why the gap matters. This is often related to one of the applicant's key factors.

Save Your Work!
Always save your work after inputting gaps data by clicking the **Save** icon on the menu bar.

Overall Item Notes Panel

TNCPE will be using the Overall Item Notes Panel two different ways:

Pre-work. As you use *Scorebook Navigator*™ to complete pre-work prior to training, you will use the space in the Overall Item Notes Panel to write the comments you were assigned (one strength comment and one OFI comment for each assigned item).

Actual Assessment. Following training, when you're assigned to an examiner team, you will use the Overall Item Notes Panel to capture critical thoughts that relate to your assessment of the overall items. These could include key themes ideas, notes on linkages to other worksheets, or possible site visit issues. It also is a place to record expected results.

The **Overall Item Notes** Panel is NOT intended to be used to capture the full set of comments for the item or key themes.

Item Scoring Panel

The primary purpose of this panel is to provide a scoring grid that you will use to:

- Determine the score for each evaluation factor
- Determine a holistic scoring range
- Determine a percent score that is a multiple of five

Using the data you entered, the *Scorebook Navigator*™ software will automatically calculate the score and enter it on the score summary page. It also will provide the number of key factors that were used, and determine the number of evaluation factors that are significant and/or related to key themes.

Item Evaluation Screen Tips

On the Item Evaluation Screen, you'll notice new icons on the top left portion of the menu bar:

Collapse Panel

Open Panel

Create bold text. To use this feature, highlight the text you want to bold and click the exclamation point icon.

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You'll find that the **Collapse Panel** and **Open Panel** icons are handy as you work through the Item evaluation steps, especially when the fields start filling up with content. Collapsing panels will create a more user-friendly interface, allowing you to focus on one evaluation section at a time.

Key Themes Screen

The Key Themes Screen allows the examiner to document the most important strengths or outstanding practices of potential value to the applicant organization.

> **A Note on Key Themes**
> Examiners are not responsible for identifying key themes in pre-work; however you are required to identify key themes when you evaluate an actual TNCPE Award applicant.

The **Key Themes** Screen is divided into two columns: The "Observations" column on the left and the "Themes (Strengths)" column on the right.

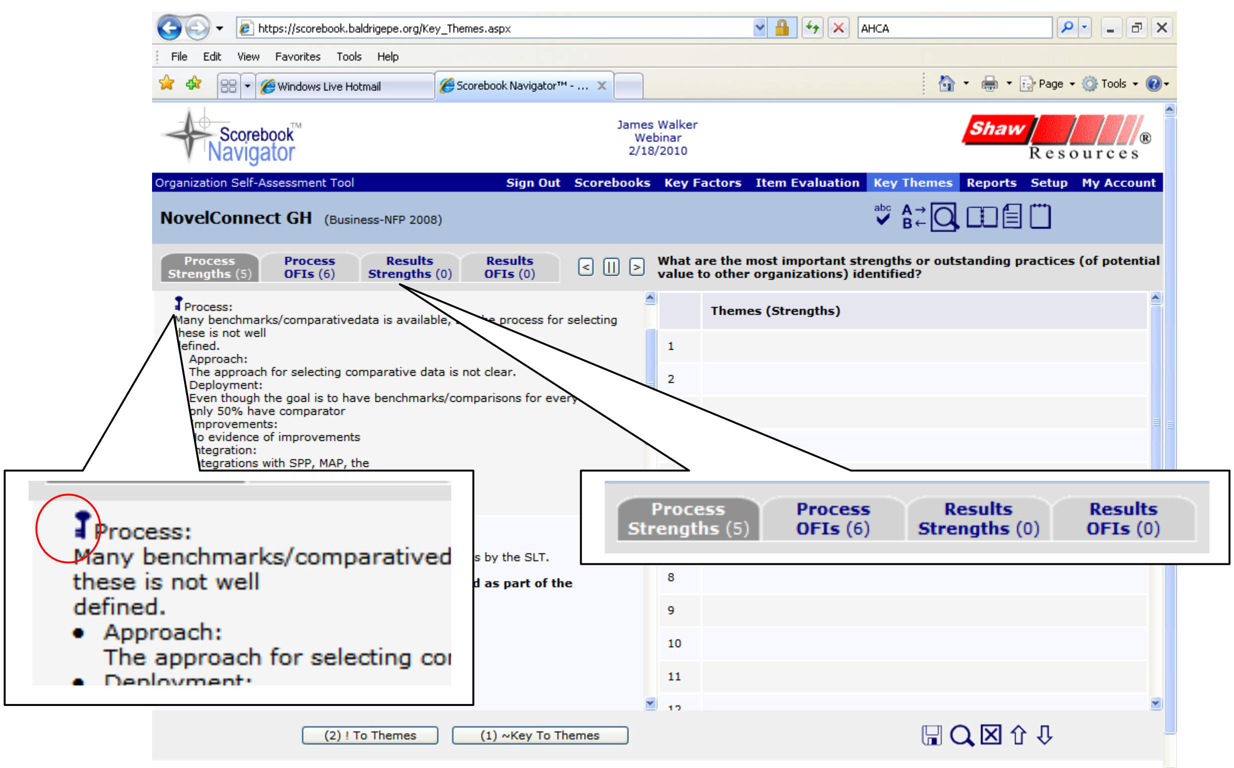

FIGURE 11 - The Key Themes Screen. Note how your list of item observations in the left-hand column is organized into tabs. The key symbol designates an observation you tagged as a potential key theme.

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“Observations” Column Screen Tabs

The “Observations” column is a list of all your Item observations. It is organized into four tabs: **Process Strengths**, **Process OFIs**, **Results Strengths** and **Results OFIs**. The numbers next to the tabs represent the number of rows of observations included on the tab.

- **The Process Strengths Tab** contains all of the observations in the ADLI matrix, including both “+” and “–” comments.

- **The Process OFIs Tab** contains the same observations as the **Strengths** Tab, plus your **Gaps** Panel entries for process items.
- **The Results Strengths Tab** contains all of your LeTCI observations.
- **The Results OFIs Tab** contains all of your LeTCI observations, your **Gaps** Panel entries for results items

The observations you identified as potential key themes during your item evaluation are designated with a key symbol. Any observations that you bolded will be bolded here also.

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Key Themes Screen Manipulation Buttons

There are three screen manipulation buttons to the right of the **Strengths**, **Results** and **OFIs** Tabs that look like "less than," "parallel" and "greater than" symbols. These buttons allow the examiner to hide either the right or left panel, and then restore the view to side-by-side format.

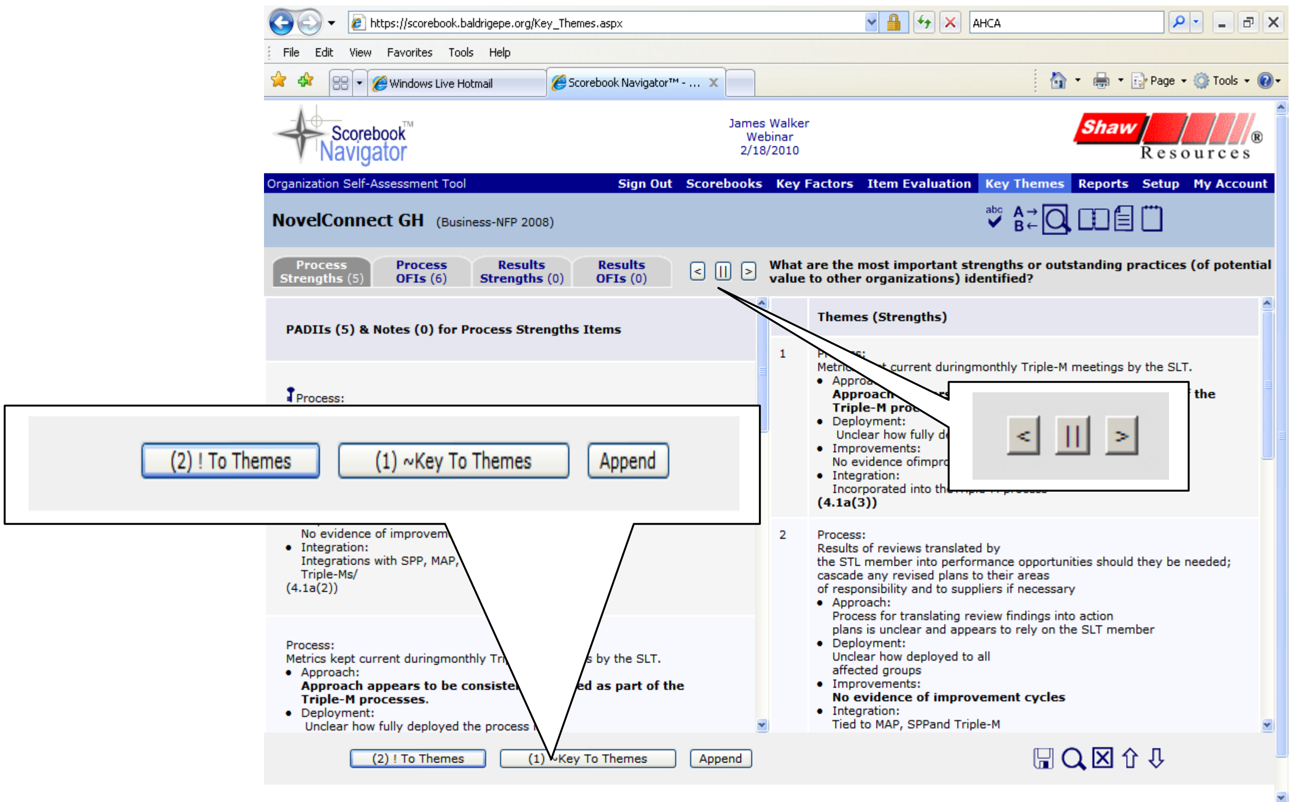

FIGURE 12 - **The buttons at the bottom of the Key Factors Screen will help you transfer your item observations into the "Key Themes" column. The three screen manipulation buttons detailed here allow you to view the columns by themselves or in side-by-side format.**

Capturing Key Themes

To create or edit key themes, click on any row in the right-hand column to open a text field. Use your item observations listed in the left-hand "Observations" column as your primary resource as you write key themes.

There are two ways to transfer "Observation" column content to the "Key Themes" column:

- Copy and paste text from your list of observations in the left-hand column to the right OR
- Highlight the text and transfer your selected content with the buttons at the bottom of the screen:

- **! To Themes** only transfers processes that include significant (bold) observations

- **~Key To Themes** only copies processes that were tagged as key themes.

- The **Append** button is used to add your selected content to a Key Theme you have already transferred.

There's an added benefit to using the *Scorebook Navigator* ™ buttons to transfer your observations – the software will not duplicate content that has already been copied over.

Reports Screen

Scorebook Navigator ™ can output a set of reports that will help you manage and evaluate your work. Click the **Reports** Tab to open the **Reports** Screen.

Use the "Select a Report" drop-down menu to choose the report that you would like to view. You have several options:

Action Items
This is the complete task list of action items that you have developed during the evaluation process.

Key Factor References
This report is a listing of all of the key factors, the number of times each key factor is mentioned, and a summary matrix listing the totals of factors by Criteria item and their associated scored points.

Key Factors
This is a listing of the key factors organized by Organizational Profile categories.

Key Themes
This report lists your key themes: the applicant's most important strengths, OFIs, and results.

Score Summary
This report details the scoring description table, along with a table of the possible score, the score percentage, and the calculated score by Criteria item.

Scorebook
This is a printer-friendly version of the completed scorebook. Print in parts or in its entirety.

Scoring Factors
This report gives the total strengths and OFIs by scoring factor, along with a table showing the distribution of strengths and OFIs by category Criteria item.

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System Usage
This report tracks how much time you've spent on an application. It also illustrates which sections of the application you've worked on. It's broken down into two different time periods: the last 24 hours and seven days.

System Use by Month
Similar to the System Usage Report, this report tracks how much time you've spent on an application by month.

Criteria Item Reports
The examiner has the ability to select a specific item and obtain its completed evaluation description.

Report Output
Once the report you have selected appears, take the following steps to print your report:

- Click the report icon (shown below) and select "Word" from the drop-down menu.

- You will be asked whether you want to save or open the document – you will be able to print the report either way.
- A new Word document containing your selected item will open.

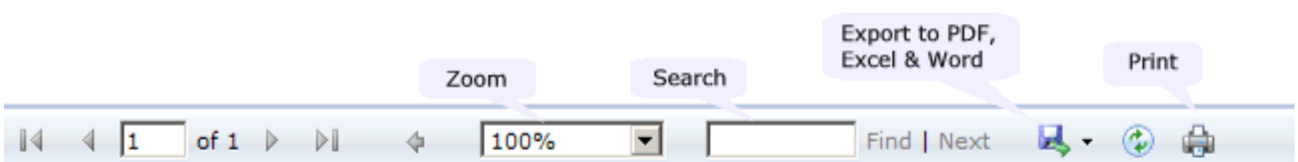

FIGURE 13 - The Reports Screen features a drop-down menu of reports. When you open a report, you will have access to a menu that allows you to choose how you want to output your report

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Finishing Stage 1 – Independent Review

The final steps of Stage 1 – Independent Review are simple.

If you are completing independent review for an actual award applicant:

1. Return to the Scorebooks Screen

2. Check the "Done" box to notify your team leader that you have finished your independent review.

For your pre-work assignment:
Follow the printing instructions on page 11 of the Step-by-Step Instructions document:

1. Select the "Reports" button.
2. Click on the down arrow to produce a drop-down menu.
3. One at a time, select the items you have evaluated. For example, select item 1.1.
4. Once item 1.1 appears, click the "Report" icon (shown below) and select "Word" from the drop-down menu.

   

5. You will be asked whether you want to save or open the document – you will be able to print the document either way.
6. A new Word document containing item 1.1 will open. The document will be several pages long.
7. Save the document.
8. Repeat this process for each item assigned for pre-work.
9. Print two copies of your completed pre-work assignment and bring both copies to your three-day examiner training class.
   - When you print, DO NOT duplex (double-side print) your pre-work.
   - Print only your key factors and the assigned items (not the entire Scorebook).
   - Staple together the pages of each item, so that the key factors are a separate packet, item 1.1 is a separate packet, item 3.1 is a separate packet, and so on.

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