Getting Started Checklist

This document provides a printable or interactable PDF version of our Getting Started Checklist article, which you can use to tick off each step as you work through. The checklist is designed to guide you through all the necessary steps to complete the setup of Sisra Observe for the first time.

Click the links to the full articles for more information on each step, as well as additional optional features that you can set up to get even more functionality from Observe.

Step 1 / Structure

To start, you will need to set up your Structure which involves creating your departments and teams, to replicate your team structure. These are used to control the reports, records, staff and permissions. For more information, check out this guide - What is the Structure / Curriculum? section

- [ ] Structure - Create your departments and teams via **Admin > Data > Structure > Structure List**.
- [ ] Excel Add-In - Our Excel Add-in is useful for preparing class and staff data to import to Observe.
- [ ] Class Data - This is an optional feature, where you can set up Class Contexts to be able to import class data and have this available when completing records.

Step 2 / Staff

Once you have set up your Structure, you're ready to import your staff data. Staff data populates Observe with the names and details of the members of staff at your school and is required before you can create any records. For more information, check out this guide - What is Staff data?

- [ ] Define Staff Filters - Observe needs certain staff information to be able to work, such as Title, Name, etc. However, you also have the option of creating additional staff filters, which you can use to filter your reports by (e.g. Role etc.)
- [ ] Prepare Staff Data - You can use the Excel Add-in or manually prepare your staff data to import.

Step 3 / Settings

Now that you have imported your staff data, you can move on to the Settings section. This section allows you to define your school/academic year, create student groups, and select your account preferences.

- [ ] Define School Years - You can set up your school/academic year via **Admin > Settings > School Year**. This allows you to define the start and finish dates for each, which will determine which academic year each of your records is displayed in, based on the date entered on the record.
- [ ] Create Report Windows - You also have the option of creating report windows via **Admin > Settings > School Year > Report Window List**, to define periods of time within a school year, e.g. terms, months. You can then use these to filter your reports and view trends over time.
- [ ] Create Student Groups - Student Groups can be used to define which Year Groups or Focus Groups you would like to be available when creating records or when filtering your reports.

Step 4 / Templates

Now you're ready to build a template. Templates contain a combination of fields and focus areas and are used by your staff to create records in your school. They are organised by Template Type, to help make it easy for you to organise your records and reports into the type of record that they relate to, such as Quality Assurance, CPD, etc. For more information, check out this guide - What are Templates? (Admin)

- [ ] Template Types – There are 3 types by default (Quality Assurance, Appraisal & CPD), which can be renamed to reflect your chosen types or you can add an additional type (**Admin** > **Templates** > **Template Types**).

- [ ] Categories - Categories play an important role in defining who can create and access certain records. They can be assigned to multiple templates if you want to. A category must be selected when you create a template.

- [ ] Create Outcome Sets - Outcome sets are used in conjunction with focus areas and define the analysis available in your reports. Outcome sets, when linked to a focus area, appear as dropdown boxes when completing the record, so you and your staff can select the appropriate 'outcome' for that focus area. Then each outcome set will become a table in the reports, listing the focus areas that have been associated with it and the count/percentage of each outcome.

- [ ] Create Focus Areas - Focus Areas can be used to evaluate specific areas of teaching or other areas within a record. They can be linked with outcome sets to provide a way of analysing performance in that area, or alternatively not linked to an outcome set and be used as a comment box. Any comments entered on a focus area can be pulled through to the reports for analysis.

- [ ] Create Fields - Fields can be added to a template to record information that is relevant to individual records, but not to overall analysis. Information captured using fields will **NOT** pull through to the reports. Any information required in reports should be created as Focus Areas.

- [ ] Create Templates - Once you have created all the elements to form your template, you can begin adding them to your first template via **Admin > Templates > Template**.

Step 5 / Users

Now you are ready to set up your Users. This section is important, not only for setting up your staff with access to Observe, but this is also where you can define their individual permissions, so you can make sure each staff member can see exactly what they need to.

- [ ] Create User Groups - User Groups control access levels and affect permissions, allowing you to control which records can be created and viewed by the users within that group. For example, you may have user groups for HoD, SLT, NQT, etc.

- [ ] Create Users - You can either manually create your users via **Admin > Users > User > User List**, or alternatively prepare and import a CSV file to create them all at once.

- [ ] Define Permissions - If a user requires access to view other staff member's records / reports (e.g. head of department), this is set up on an individual user basis. By default, users can only view their own records.

Next Steps...

And that's it, you've completed the setup! Well done! Below we've provided links to useful articles for further reading, which expand on other aspects of Observe, such as creating records, adding evidence & actions, and analysing the reports, which may be handy for staff who will be responsible for this.

As a Sisra Admin however, if you have any questions, the Support team are here to help. You can reach us by clicking the purple **Support** button to start a chat in real time with one of the team (Monday to Friday, 9am - 5pm (UK time)). For more information on contacting the Support team, see our article - ADMINS - How to Contact Customer Support (Live Chat).

Additional Reading:

- Creating & Managing Records
- Navigating the Reports
- User Basics - This is a useful article to pass to your staff, as it contains a downloadable PDF that guides them through navigating around Observe from a user's perspective.