



Scorebook Navigator™

Stage 1 Independent Review User Manual

Version 11.2013

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Getting Started

The *Scorebook Navigator*[™] will facilitate the evaluation process for Baldrige-based performance excellence system descriptions, created to identify strengths and opportunities for improvement.

Browser Requirements

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

- Internet Explorer 6.0 or later
 - For IE10, the report function requires operation in the compatibility mode.
- Firefox 5.0 or later
- Safari 4.0 or later
- Chrome

When a user logs into Scorebook Navigator with a different browser they will receive a warning that the application may not work properly unless 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 1024mb)

Internet Explorer

1. Enable Java

- a. In Explorer 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, i.e. 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
 - c. In Safari 5.1 click on the tools wheel on the right side of the location bar and select preferences 
 - d. 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

Firefox

1. Enable Java and Javascript and unblock popup windows
 - e. In Firefox 5.0 in the menu bar click on 'Tools' and then 'Options'

- f. Open the content tab and make sure 'Enable Java Script' setting is checked and uncheck 'Block pop-up windows.'
 2. Delete temp files
 - b. In the same options window, open the 'Privacy' tab and click the link that says 'clear your recent history.'
 - c. 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.)
 - d. 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'

Chrome:

1. Click on the "Customize and control Google Chrome" icon (three horizontal bars) to the right of the Browser window
2. Click on Settings, then scroll down and click on "Show advanced settings" Click on the "Content settings" box in the Privacy section. Scroll down to the JavaScript section and ensure that the button beside "Allow all sites to run JavaScript (recommended)" is checked.
3. Scroll down on the same page to find the Popups section. Click on the "Manage Exceptions" box and enter scorebooknav.org in the "Add a new hostname" box. Set the behavior to Allow and click Done. Scroll to the bottom of the page and click Done.
4. Click on the "Clear Browsing Data" box in the Privacy section. With a check mark in box next to Empty the Cache, select "from the beginning of time" in the drop down and click on "Clear browsing data"
5. To increase the size of the cache:
 - a. Right-click the Google Chrome shortcut on the Start menu or desktop and select "Properties."
 - b. Click the "Shortcut" tab at the top of the "Google Chrome Properties" window.
 - c. Click the "Target" field, and push the "End" key to move the cursor to the end of the text.
 - d. Push the space bar once.
 - e. Type "--disk-cache-size=1048000000" in the field.

- f. Click "OK." Close any running instances of Google Chrome, and re-open the browser to begin using the new cache size.

Logging in

When you log in for the first time, follow the steps below.

1. Go to <https://scorebooknav.org>
2. Input your username and password (assigned by your Program Staff)
3. On the Terms of Use Screen click on the accept button for access authorization. This limits your use of the *Scorebook Navigator*™ to program purposes – not for your personal or business use.

Setting Up Your Account

After your initial login, you will be 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

Find Your Scorebook

To access your assignment, please click on the **Scorebooks** Tab (found on the menu bar, see page 6). Once open, you will see a link to your assignment under the “Scorebooks” column heading.

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 reclick 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 your Program Staff.

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 the Scorebook Navigator, you'll see a menu bar that includes these tabs:

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

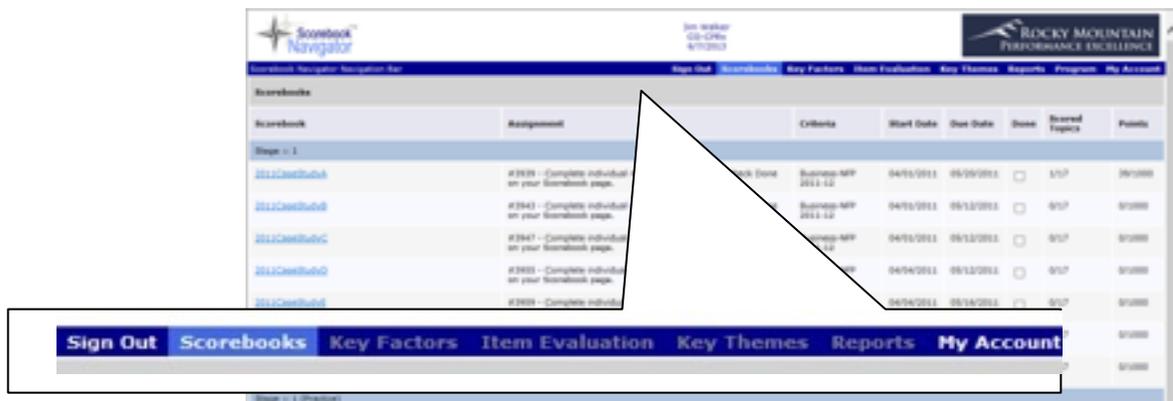


FIGURE 2 - Scorebooks Screen and detail of menu bar.

Access your scorebook

From the Scorebooks Screen, you'll be able to 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 Healthcare).



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.

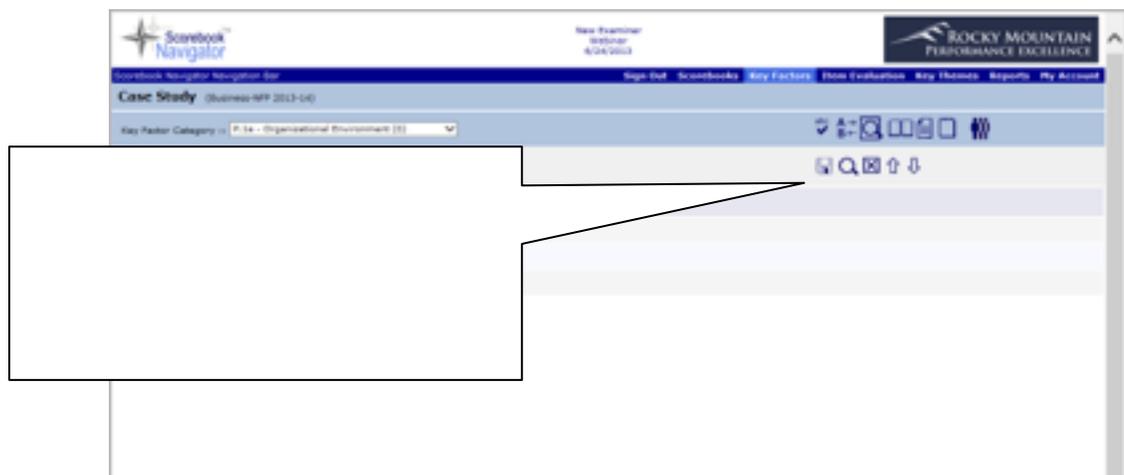
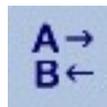


FIGURE 4 - A toolbox of helpful icons will help you write your evaluation.

Glossary of Tools



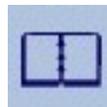
Spell Check. The spell check will only review what is included on the open screen – it will not check spelling for the entire evaluation.



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



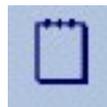
Print Preview. Creates a printer-friendly version of what you see on the screen you're working on.



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. If implemented by your Program, this tool will display a copy of your application. Not all programs implement this feature.



Record notes and action items. This screen may 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.”



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.



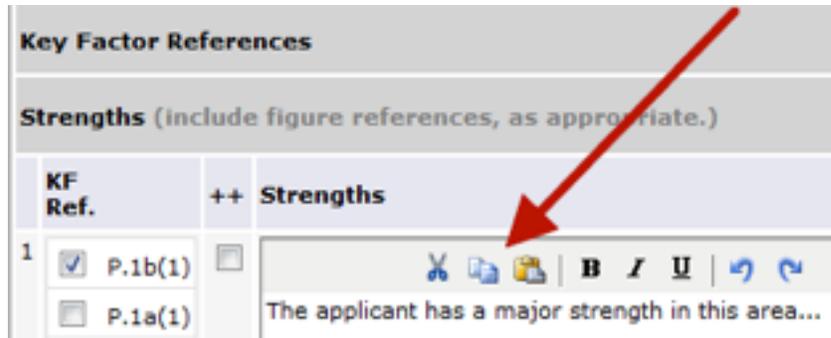
Move Row Up. Moves up a row of text in a data entry field.



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

Copy and Paste Warning

Examiners often work on key factors and other items in MS Word, Adobe Acrobat or other applications outside of the Scorebook Navigator software. It is then possible to copy and paste that data into Scorebook Navigator. However, in order to prevent errors in Scorebook Navigator, examiners must use the 'paste' icons in the application to remove unintended coding.



MS Word, PDF's and other applications have coding embedded within the text that needs to be stripped before pasting into Scorebook Navigator. The copy/paste icons in Scorebook navigator strip any pasted text of embedded coding.

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.

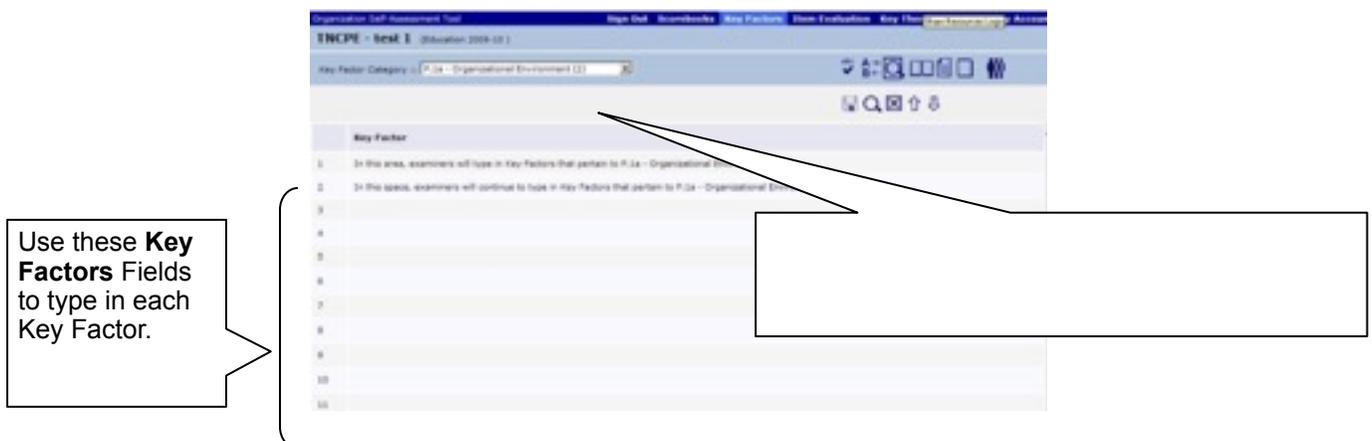


FIGURE 5 - Use the Key Factors Screen to document the applicant's key factors. Note the drop-down menu that allows you to record key factors according to the Organizational Profile's Areas to Address categories.

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.

The 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!

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.

Key Factor Consolidation

After all team members have created their key factors, a single examiner (perhaps the team lead) will be assigned to create a consolidated list. After the consolidated list is finalized (a consensus process may be used to achieve this finalization), the consolidated list will be available in the scorebook for the team's use.

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.

This is the top portion of the evaluation section on the Item Evaluation Screen. It continues as you scroll down the page.

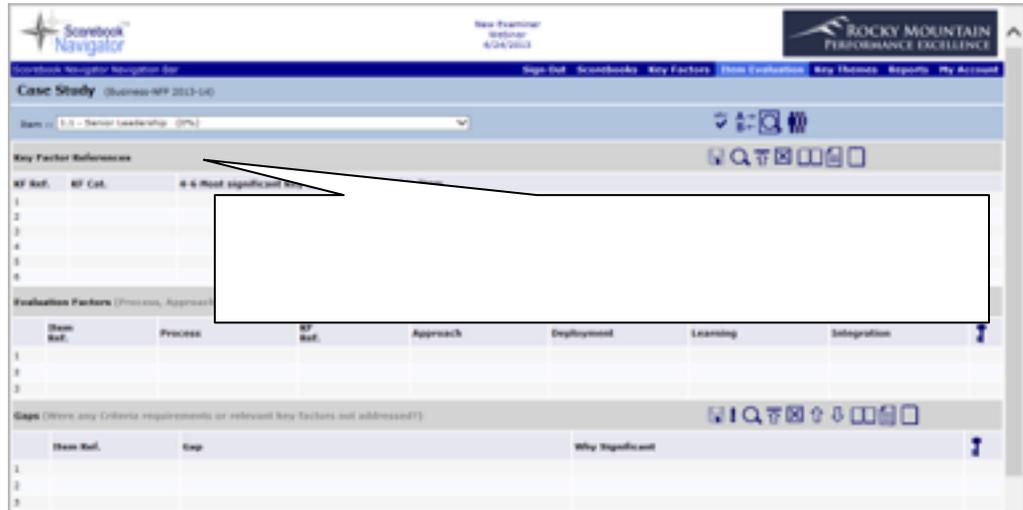


FIGURE 6 - This is the 2007 Item Evaluation Screen. Note the location of the Item Field (detail) and the evaluation sections (left).

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

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.

After you click the **Save** icon, the key factor Organizational Profile Area to Address number that corresponds with your Key Factor selection appears here.

The screenshot shows a software interface with two main panels. The top panel, titled 'Key Factor References', has a dropdown menu set to '1.1 - Senior Leadership (40%)'. Below the title is a table with columns 'KF Ref.', 'KF Cat.', and a description. The table lists six key factors. A callout box points to a dropdown menu in the 'KF Ref.' column, which is currently showing '1.1a(1)'. The bottom panel, titled 'Evaluation Factors (Process)', has a table with columns 'Item Ref.', 'Process', and 'Area to Address'. A callout box points to the 'Area to Address' column, which contains the number '7.6 - Leadership'. The background of the interface shows detailed text for the selected key factor, including 'Key Challenges' and 'Key Changes'.

Pick the appropriate key factor from the drop-down menu that appears when you click on a field in this column.

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.** Copy and paste the question you are evaluating from the Criteria requirements window that opens when you hover over an Item, or type in a summary.
- **“KF Ref.” column.** Use this column to identify the 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.

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.

Optional: Overall Item Notes Panel

Use the space in this panel to capture a critical thought that relates 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

Final Score	Overall	Key Factors	Strengths	Gaps & Offs	Feed Back Ready Comments																
		0 (0 not used)	0 (0+, 0-40%)	0 (0-, 0-40%)	0 (0-40%)																
Factor	0-5%	00-25%	30-45%	50-65%	70-85%	90-100%															
Approach	No systematic approach to item requirements is evident; information is avoided.	The beginning of a systematic approach to the basic requirements of the Item is evident.	An effective, systematic approach, responsive to the basic requirements of the Item, is evident.	An effective, systematic approach, responsive to the overall requirements of the Item, is evident.	An effective, systematic approach, responsive to the multiple requirements of the Item, is evident.	An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident.															
Deployment	Little or no deployment of any systematic approach is evident.	The approach is in the early stages of deployment in most areas or work units, including progress in achieving the basic requirements of the Item.	The approach is deployed, although some areas or work units are in the early stages of deployment.	The approach is well deployed, although deployment may vary in some areas or work units.	The approach is well deployed with no significant gaps.	The approach is fully deployed without significant gaps in any areas or work units.															
Learning	An improvement orientation not evident; improvement is achieved through reacting to problems.	Early stages of a transition from reacting to problems to a general improvement orientation are evident.	The beginning of a systematic approach to evaluation and improvement of key processes is evident.	A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for ensuring the efficiency and effectiveness of key processes.	Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing.	Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization.															
Integration	No organizational alignment is evident; individual areas or work units operate independently.	The approach is aligned with other areas or work units largely through joint problem solving.	The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other Process Items.	The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items.	The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items.	The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items.															
Item 1.1 Overall	0-5%	00-25%	30-45%	50-65%	70-85%	90-100%															
Item 1.1 Score	0-5%	10-20%	30-40%	50-60%	70-80%	90-100%															
Item 1.1 Score	0	5	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	100

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

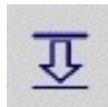
Using the data you entered, the *Scorebook Navigator*™ software will automatically calculate the score and enter it on the score summary page. It also will provide the number of key factors that were used, and determine the number of evaluation factors that are significant and/or related to key themes.

Item Evaluation Screen Tips

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



Collapse Panel



Open Panel



Create bold text. Highlight the text you want to bold and click the exclamation point icon.

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.

And no matter where you're working in the scorebook, make a habit of clicking the **Save** icon whenever you input data.

Reports Screen

The *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.

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

After opening a report, use the report  icon to export to Word, PDF, or Excel or the  icon to print.

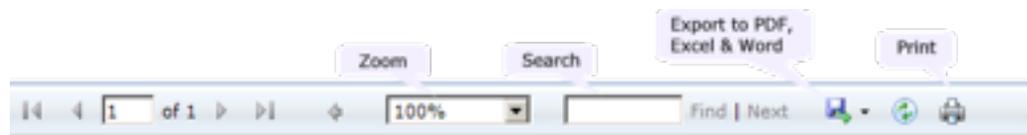


FIGURE 13 - The Reports Screen features a drop-down menu of reports. When you open a report, you will have access to a menu that allows you to choose how you want to output your report

Finishing Stage 1 – Independent Review

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

If you are completing pre-work:

1. Export your scorebook to Word
2. Print a copy of the Word version of your pre-work scorebook to take to examiner training to be used during class exercises.

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 finished your independent review.