Team Assessor 2.0

User's Guide

Version 2.0, Rev. 2/97

iQ
COMPANY
INNOVATION QUALITY

Team Assessor 2.0 Features

- Merge scores & comments from up to 100 assessors

- Achieve quick consensus using statistics and graphs

- Print and export reports

- Tap into 1000s of resources for improvement feedback

- Consult online hypertext help for assessment tips

- Customize the assessment for any organization

- Compatible with Windows 95, 3.1, and most Networks

- Compatible with Microsoft Word

Unconditional Satisfaction Guarantee

IQ Company unconditionally guarantees your satisfaction with this product for a period of 60 days from the date of purchase. If for any reason you are dissatisfied with this product, simply erase the software from your system and return the diskettes and documentation to IQ Company for a full refund.

Notices

Contents

1. Overview

What's in Your Package

Thank you for choosing Team Assessor 2.0! Congratulations on your decision to invest in this powerful and easy-to-use assessment software. Your Team Assessor 2.0 package should contain:

- Quick Start Instructions Sheet

- One Team Assessor 2.0 Program Installation Disk

- One or more Assessment Disks

- Team Assessor 2.0 User's Guide

- Software Warranty Registration Form

Team Assessor 2.0

Team Assessor 2.0 helps you conduct a valid assessment as efficiently as possible, assisting with assessment education, data input and collection, assessment roll-up, score analysis and graphing, consensus and trend graphing, and assessment reporting. Each assessor learns about the assessment criteria and completes the assessment using Team Assessor 2.0. Use Team Assessor 2.0 to merges the scores and comments of the individual assessors into a new, "rolled-up" assessment. Team Assessor 2.0 can merge results from departments, sites, or entire organizations. Statistics and graphs immediately reveal where assessors agree and disagree and facilitates consensus scoring. Trends can quickly be established by rolling up and graphing assessments from different points in time. Reports can be customized to include comments from all, some or none of the assessors. Merged results can be exported to an ASCII text file for report formatting in your word processor. Team Assessor 2.0 recommends improvement resources from its built-in resource libraries based on your assessment score and allows you to search these libraries by assessment topic or keyword. Use these improvement resources for making recommendations in your feedback report.

Other features include viewing and graphing the results of assessments for gap-analysis -- at any level of detail -- and printing assessment questions, comments, scores, graphs, tables, resource lists, and abstracts of recommended improvement resources. Printed reports can be tailor-made to fit specific projects.

Assessments

Team Assessor 2.0 is designed to work with many different assessments. This Team Assessor 2.0 package includes one or more assessments, called assessment "modules". Other assessment modules (including customized assessments) are also available. Each assessment includes criteria, expert help with the criteria, and assessment-specific resource libraries.

Protecting Your Investment

You can protect your investment in this software by making back up copies of the installation disks, and by registering your software.

Backing Up Your Diskettes

Please see your DOS or Windows manual for information on how to make backup copies of diskettes. Please note that our single-user license agreement allows you to make copies of the diskettes for backup purposes, but not to install the software on more than one computer (or on a multi-user network), or to distribute to other people. Please refer to the licensing agreement.

Registering the Software

Register your software on the Internet at **http://www.iqco.com**, or complete and fax/mail the software warranty registration form. Registration entitles you to 90 days of free user support. Registration also entitles you to other free or discounted offers available only to registered users.

Summary of How to Use Team Assessor 2.0

To install Team Assessor 2.0, read the **Quick Start instructions** sheet included in your package.

After you have installed the software, follow these basic steps:

1. Answering the Assessment.

To start Team Assessor 2.0, double-click on the **Team Assessor 2.0** icon in the Team Assessor 2.0 program group on your desktop. Select **New** from the **File** menu. Choose an assessment from the list that appears. Use the **up and down arrow buttons** in the upper right of the screen or the **GoTo** menu to navigate. Answer the questions by scoring and/or typing in comments. Team Assessor 2.0 will take up to seven pages of comments for each question. Items from other documents may be pasted into the Comments box. Get help on assessment questions by selecting the **assessment name** from the **Help** menu. Click on the hypertext links to get expert tips, definitions, etc. for a particular question or section. Print assessment questions (with or without comments and responses) by selecting **Print** from the **File** menu. Choose how much of the assessment (single question, section, or entire assessment) to print from the options under **Print**.

2. Merging Assessments.

Each assessor should save his or her assessment in a separate file (with **.smt** extension). Place all files in a common disk or directory on your system or server. Close any open assessment and choose **Merge** from the **File** menu. Select the **Assessment Type** at the top of the Merge Assessment Responses dialog box. Click the **Add** button to view the names of saved assessments, and double-click on a name to add it to the merge list. When the list contains all the assessments you wish to merge, click the **Merge** button. Depending on the number and size of assessments and the speed of your computer, the

merge may take several seconds to several minutes. When the merge is complete, use the **left and right arrow buttons** in the lower right corner of the screen to flip through the comments and responses of each assessor for a particular question.

3. Viewing and Graphing Results..

Select **Results** from the **View** menu. Just below the Toolbar and menus, you can select a checkbox to display **Individual Scores**, **Average Scores**, **Standard Deviation**, or **Range**. (Note: The checkboxes are active only in merged assessments.) When selecting **Individual Scores**, use the **left and right arrow buttons** in the upper-left to flip through scores for individual assessments. In the results display area (results table), **double-click** on items that have a "+" in front of them to expand and show a more detailed breakdown of your results. **NA** appears if a question or section is not completely scored.

Highlight items to graph by single-clicking on them. Graph highlighted items by selecting the **Graph** button at the bottom of the screen. Click **OK** to hide graph or **Print** to print. To plot the scores of multiple assessments on one graph, choose **Overlay** from the **File** menu. Click the **Add** button in the Overlay Files dialog box and **double-click** on selected file names. When you have finished adding files, click **OK**. Click on the **Overlay Graph** button to create the graph. The overlay graph allows you to see where assessors agree and disagree and can help speed the consensus process by targeting assessment areas to discuss. Overlay graphs also allow you to graph trend by plotting assessments from different times on one graph.

If available, select the **Estimate** menu to see your estimated score on another type of assessment, based on your current assessment score.

4. Viewing Improvement Resources.

From the results table, **highlight** one or more areas for which to get recommendations. *You must select one or more areas whose score is not NA to get recommendations* Select **Recommendations** from the **View** menu. Choose one or more libraries from the **Library** menu. The first time you select each library, a message will appear. Click **OK**. To view recommended resources from the selected libraries, click the **Get Recommendations** button at the bottom of the screen. If you have selected more than one library, a list of the libraries will appear. **Double-click** on a library to see a list of recommended resource titles in that library. You can print the list of recommended resource titles by selecting **Print** from the **File** menu. To see more detailed information on resources, highlight one or more titles by single-clicking on them, then select the **Examine Resource...** button. You can print detailed information on a resource by selecting the **Print** button on the bottom of the Recommended Resource window.

You can also search the selected resource libraries directly by clicking the **Find** button on the Recommended Titles screen. Type in up to 30 characters of text. All resources containing that text will be displayed.

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2. Using Team Assessor 2.0

This chapter provides more detailed information on each of the steps summarized in Chapter 1:

1. **Answering the Assessment**
2. **Merging Assessments**
3. **Viewing and Graphing Results**
4. **Viewing Improvement Resources**

Answering the Assessment

This section describes in detail the process for:

- installation

- creating new assessments

- opening saved assessments

- answering assessment questions

- entering comments

- navigating through the assessment

- getting online help with the assessment criteria

- saving your work

- printing the assessment

- exporting information to an ASCII text file

- merging assessments

- exiting Team Assessor 2.0

Installation

To run Team Assessor 2.0, you need a computer running the Windows 3.1 or 95 operating system. You should have a minimum of 8MB of free space on your hard disk, 4MB of RAM, and a 3.5" HD diskette drive. For best performance, a computer with a 486 (or faster) microprocessor and 8MB or more of RAM is recommended.

1. Start Windows.
2. Insert the **Team Assessor 2.0 Installation Disk** in your diskette drive (usually 'A' or 'B' drive).
3. Select **Run...** from the **File** menu in Program Manager (**Start menu** in Windows 95).

4. Type **A:\SETUP** (or B:\SETUP) in the command line box. Click **OK**.
5. Respond to prompts as needed.   You will be asked to specify the directory for installing Team Assessor 2.0. If you do not have a preference, select the **Continue** button and Team Assessor 2.0 will install in the default directory (**C:\SMART**). If you want to specify a different directory, type the name of your preferred directory in the box or follow the prompts specifying a new directory.
6. After the program disk has installed, repeat steps 2 - 5 with any assessment disks included in your package. **Note that you must install the assessment disks to the same directory in which you installed the Team Assessor 2.0 program disk.** Otherwise, Team Assessor 2.0 will not be able to locate the assessment.

The installation program automatically creates a program group with a Team Assessor 2.0 icon. Double-click on the **Team Assessor 2.0** icon to start Team Assessor 2.0.

TIP: **If you have trouble installing Team Assessor 2.0, or any of the assessment disks:**

a) **Check to make sure you have 8MB of free space on your hard drive.**
b) **Disable any virus detection programs that may be running.**
c) **Restart Windows and reinstall, beginning with the disk where the problem occurred.**

New Assessments

When you start Team Assessor 2.0, the IQ Company copyright notice appears and will remain until you select one of the menu options. To open a new assessment (as opposed to a saved assessment), select **New** from the **File** menu. The **New Team Assessor 2.0 File** dialog box will appear.

The dialog box contains a list of all the assessments available to you. If your package came with a single assessment, that assessment will be the only one listed. (If you obtain additional assessments and install them, they will automatically appear in the dialog box.)

Select one of the assessments by **double-clicking** on it. The Assessment view will appear.

Opening Saved Assessments

To open a saved assessment, first close any open assessments by selecting **Close** from the **File** menu. Then select **Open** from the **File** menu. The **File Open** dialog box will appear. Select an assessment from the list by **double-clicking** on the assessment name (assessments have an .**smt** file extension). The Assessment view will appear.

TIP: If you do not see an assessment that you have saved:

a) You may not be looking on the correct disk drive. To change the disk drive, click on the arrow in the lower right corner of the dialog box, beneath the word DRIVES. A list of disk drives will appear. Click on the drive of your choice.

b) You may not be looking in the correct directory. To change the directory, click in the list on the right of the dialog box underneath the word DIRECTORIES. Click with the mouse and use the scroll bar until you are in the directory where you saved your assessment.

c) You may not have saved your assessment with the .SMT file extension. Click on the arrow in the lower left corner of the dialog box under the words LIST FILES OF TYPE. Select ALL FILES from the drop-down list. Browse the list of files for your assessment.

Answering Questions / Comments

Once the Assessment view appears, you are ready to score questions and enter comments. Before you begin, you may want to familiarize yourself with the Assessment Screen.

The Assessment View

The Assessment view includes the assessment criteria, fields for scoring and comments, and access to expert help on the assessment criteria. At the top of the Assessment view is a title bar that tells you the type of the assessment you are taking, and the specific name of the file where your assessment data will be saved. Below the title bar are pulldown menus. Below the pulldown menus is a toolbar. Clicking on a toolbar button can accomplish the same thing as selecting from the pulldown menus. To get to the Assessment view, click on the "**AB**" toolbar button, or select **Assessment** from the **View** menu. The other toolbar buttons are described in the Other Features section of this manual.

Question Types

The assessment questions that appear in the Assessment view may be of several types. Some are messages. Clicking on the OK button advances you to the next question.

Some questions are numerical or text response items that ask you to type a word, phrase, or number from the keyboard.

Some questions are multiple choice. Score by clicking on a choice button. Some questions have a comments box where you can enter comments. You can enter up to 32K (7-10 pages) of text per Comments box. You may cut and paste items from other documents into the Comments box.

Fonts

You may choose a font for viewing the assessment questions and comments by selecting **Font…** from the **View** menu. The default font is Courier.

Include Comments Checkbox

Below each comments box in the assessment is a checkbox that reads "Include these comments when printing or merging." This box allows you to include or omit this individual comment when printing an assessment or when merging the assessment with other assessments. Single-click on the checkbox to check (include comment) or uncheck (omit comment).

When printing or merging, you will also have the option to override these checkboxes and print all comments or no comments.

Auto Advance

Normally, clicking on a multiple-choice button will automatically advance you to the next question. However, there may be times when you do not want this to happen, such as when you are entering only comments. To turn off the automatic advance feature, select **Auto Advance** from the **View** menu. The checkmark beside Auto Advance will disappear, indicating that it is turned off.

Navigating

Up and Down Arrows

The **Up and Down arrow buttons** in the upper right of the Assessment view allow you move backwards or forwards through the assessment.

GoTo Menu

Use the **GoTo** menu to jump immediately to any question or section of the assessment by selecting from a series of cascading menus.

Toolbar

Use the Toolbar to navigate between assessment screens. Click on the A/B icon to jump to the assessment section. Click on the graph icon to jump to the results screen. Click on the light bulb icon to jump to the resources screen.

Viewing Help

Two basic types of help are available:

1) Help on using the Team Assessor 2.0 program.

2) Expert help on the assessment criteria.

Both types of help are accessible from the **Help** menu. Choose the **Team Assessor** option for help on how to use the Team Assessor 2.0 software. For expert help on the assessment criteria, select the **assessment name** from the **Help** menu.

Other options on the **Help** menu include: **Using Help** and **About Team Assessor**. Using Help provides information about using the Microsoft Help facility incorporated in the Team Assessor 2.0 software. About Team Assessor 2.0 tells you the current version and copyright information for Team Assessor 2.0, and provides IQ Company's contact number for customized assessments.

TIP: Note that help on the assessment criteria is only available from the Help menu when you are in the Assessment view.

If you bring up help, and then click back on the Assessment view to answer a question, the help window disappears. To keep the help window visible, go to the Help menu of the <u>help window</u> and select "Keep Help On Top," and then "On Top."

If the help window takes up too much of the screen, resize it using your mouse. For many assessments, it works well to have the Assessment Help occupying the bottom third of the screen, freeing the top two-thirds to display the question items. You may also minimize the Help window, and then reopen it as needed. Select the "Using Help" option from Team Assessor 2.0's "Help" menu for more information.

Saving Your Work

To save your assessment, select **Save** or **Save As...** from the **File** menu. **Save** will save the current assessment under the filename displayed on the title bar at the top of your screen. Clicking on the "**disk**" toolbar button does the same thing as selecting **Save**.

To save under a different filename, select **Save As...** from the **File** menu. In the **File Save As** dialog box, specify the filename, directory, and disk drive where you want to save your assessment. Assessments should be saved with the file extension **.smt**.

Printing Assessment Information

You can print a blank assessment or an assessment with your responses and/or comments, with or without criteria questions. You can also choose to print any combination of assessment sections, or the entire assessment

Select **Print** from the **File** menu in the Assessment view. The Print Assessment dialog box will appear. Highlight topics you wish to print by single-clicking on them. Double-click on a section to show subsections. To select the entire assessment, highlight the assessment name, which appears at the top of the topics list.

Print Options

When the "Include question text" checkbox is checked, criteria questions will be included in the printout. Check or uncheck by single-clicking on the checkbox.

When the "Include question responses" checkbox is checked, assessment scores will be included in the printout. Check or uncheck by single-clicking on the checkbox.

Click on one of the three radio buttons in the lower right of the box to select comments options. You may include all comments or no comments, or you may choose to include only those comments which have been selected using the "Include/Don't include when printing or merging" checkboxes found below all comments boxes in the Assessment view.

When you have defined your print options, click the **Print** button to print.

To choose a printer, select **Print Setup** from the **File**. See your Windows manual for details.

Exporting to an ASCII Text File

Any text or comments that can be printed using the Print option from the File menu can also be exported to a text file for report formatting. After choosing print options (see section above), click **Export to text file**.

Formatting Reports

The Write (or WordPad) word processor supplied with Windows works well for editing, if you wish to use the standard Team Assessor 2.0 reporting format.

Your Team Assessor 2.0 package may have included a Microsoft Word macro, for tailoring output to your particular report format. If you have questions about the macro, or would like to obtain a reporting macro, please call us at 1-800-720-6755.

If you do not have a macro and would like to customize the reporting format using Word or another word processor, simply use the **Replace...** function on the **Edit** menu to quickly remove extra spaces, line breaks, and paragraphs. For example: to remove five-space gaps in the text, select **Replace...** from Word's **Edit** menu, and enter "   " (five strokes of the spacebar) in the "Find What" field and " " (a single spacebar stroke) in the "Replace With" field.

Exiting Team Assessor 2.0

Choose **Close** from the **File** menu to close an assessment without leaving Team Assessor 2.0. Choose **Exit** from the **File** menu to exit Team Assessor 2.0. If you have made changes that are not yet saved, Team Assessor 2.0 will prompt you to save changes before exiting.

TIP: If you want to switch back and forth between two or more assessments simultaneously, start more than one instance of Team Assessor 2.0. You can then switch back and forth between assessments using Windows' multi-tasking capabilities.

Merging Assessments

Team Assessor 2.0's merge capability lets you combine the comments and scores from up to 100 different saved assessment files into a single assessment. These assessment files might represent the views of different assessors, departments, or groups within an organization, or they might be assessments from the same group at different points in time. Because you can merge a series of *merged* files, Team Assessor 2.0 enables you to "roll up" scores for an entire organization.

You can change the scores and comments of the component assessments from within the merged assessment. Any changes you make to the merged assessment do not affect the data of the original component assessments.

Here is the process for merging multiple saved assessments:

1. Save each individual assessment with a unique filename.
2. Place all assessments in a common directory on your system or server.

3. Choose **Merge** from the **File** menu.
4. Select the **Assessment Type** from the top of the **Merge Assessment Responses** dialog box. Click the **Add** button to view the names of saved assessments, and **double-click** on a name to add it to the merge list.
5. Click on one of the three radio buttons in the lower right of the box to select comments options. You may include all comments or no comments, or you may choose to include only those comments which have been selected using the "Include/Don't include when printing or merging" checkboxes found below all comments boxes in the Assessment view.
6. When the list the contains all the assessments you wish to merge, and you have selected a comments option, click the **Merge** button.

Depending on the number and size of assessments and the speed of your computer, the merge may take several seconds to several minutes. When the merge is complete, use the **left and right arrow buttons** in the lower right of the screen to flip through the comments and responses of each assessor for a particular question. The response box underneath the arrow buttons tells you which individual assessment you are viewing.

Note: You cannot merge two assessments that are of different types -- i.e. Baldrige and ISO 9000. **By using the Estimate feature, however, you can "convert" an assessment into another assessment type.**

Viewing Results

Results View

Results are viewed in the **Results view**, which contains the **results table** -- a listing of assessment questions/sections and scores.

To switch to the Results view, click on the "**graph**" toolbar button or select **Results** from the **View** menu.

Statistics for Consensus Scoring

To improve consensus, assessors often meet and discusses their scores, in order to see where they agree and disagree. With merged assessments, Team Assessor 2.0 makes this process easier. When assessments are merged, Team Assessor 2.0 automatically calculates the average scores, standard deviation, and range for each question and section, as well as for the overall assessment. These statistics help team members know at a glance where they need to focus discussion. You can also use Overlay Graphs to plot the scores of multiple assessors on a single graph, for consensus and trend analysis (see below).

Select **Results** from the **View** menu. Just below the toolbar and menus, you can select a checkbox to display **Individual Scores**, **Average Scores**, **Standard Deviation**, or **Range**. (Note: The checkboxes are active only in merged assessments.) When selecting **Individual Scores**, use the **left and right arrow buttons** in the upper left to flip through

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scores for individual assessments. The filename of an assessment appears beside the **Individual Scores** control to indicate the individual assessment being viewed.

Tabular Results

When **Individual Scores** or **Avg Scores** are checked, the Results view displays the score and possible points for each assessment item on the results table. Items with a **"+"** next to them contain subsections or questions, and can be **expanded by double-clicking** on the item. Items with a **"-"** next to them can be **collapsed by double-clicking**.

NA in the score or possible points columns indicates that not all scores have been entered for that question or section. In both individual and merged assessments, Team Assessor 2.0 calculates section and overall assessment scores based on question scores. If, any question scores are missing, a section score cannot be calculated, though scores for answered questions will be displayed.. As well, if any question scores are missing from the individual assessments in a merged assessment, an average question score cannot be calculated for that question, and the score will appear as **NA.**

Calculations

In merged assessments, Team Assessor 2.0 computes arithmetic means for Average Scores at the question level. The averages of sections are computed by summing the means of the questions in that section.

If you see NA where there should be a score, expand the topic until you see which questions have not been answered. Go to the Assessment view (click on the "**AB**" toolbar button) and enter the missing scores.

Decimal Point

Team Assessor 2.0 normally rounds scores at the question level to the nearest whole number. This procedure ensures interpretability at the question level and conforms to requirements of most assessments that do not allow for fractional scores on questions.

To see scores to the nearest hundredth of a point, select **Decimal Point** from the **View** menu. To return to rounded scores, select again.

Recalculation of Statistics

Team Assessor 2.0 allows you to change the results of an individual assessment that is part of a merged assessment. In order to preserve the integrity of your original data, Team Assessor 2.0 does not change the actual contents of the original assessment files that are merged. Rather, changes are made to the new, merged file that is created. However, changing the responses from within a merged assessment allows you to see the effects that adjusting different individual assessments have on the overall merged assessment. After you have made changes in the Assessment view, select **Recalculate** from the **View** menu in the Results view, to compute new averages, standard deviations, and ranges.

Viewing Percentage Scores

If you prefer to see what percent of the possible points you scored, rather than the absolute score, you can select **Percentage Scores** from the **View** menu. A checkmark appears next to the **Percentage Scores** option, indicating that it is turned on. Select this option again to turn it off.

Estimated Results

If you are using different types of assessments, it may be possible to take one assessment and automatically see your estimated scores on some or all of the sections of a different assessment. For example, it may be possible to answer the Baldrige assessment questions and then see your estimated score on sections of an ISO 9000 assessment.

To see if the estimation feature is enabled for your particular assessments, select the **Estimate** pulldown menu from the Results Screen. If **not available** appears, you cannot get estimated results either because you have only one type of assessment, or because a mapping has not been established between the different assessments that you are using. If the name of one or more assessments appears, select an assessment to see estimated scores.

Gap-Analysis Graphs

To graph results, you must highlight questions or section topics on the Results view by single-clicking on them. You may choose up to twenty topics at various levels of detail. Then select the **Graph** button at the bottom of the screen. Team Assessor 2.0 will produce a *Gap-Analysis* graph showing the actual and possible points for the topics you highlighted. Click on the **OK** button to return to the Results Screen. When you want to clear your highlighted selections, you can either click again on each highlighted topic, or select the **Clear** button at the bottom of the screen to clear all the highlights.

Overlay Graphs for Consensus and Trend

See the above paragraph, to select graph items. If you want to add results from other assessors to your graph, go to the Results view and choose **Overlay** from the **File** menu. Click the **Add** button in the **Overlay Files** dialog box. Then double-click on the file names containing the results you would like to add. When finished, click **OK**. Click on the **Overlay Graph** button to view multiple assessments plotted on the same graph. The overlay graph allows you to see where assessors agree and disagree and can help speed the consensus process. When used with assessments from different points in time, the overlay graph can also be used to analyze trend.

Printing Results and Graphs

To print the results shown in tabular form on the Results view, select **Print** from the **File** menu on the Results view. The Windows **Print** dialog box will appear as described earlier. Click **OK** to initiate printing. You can set up the print options by selecting **Print Setup** from the **File** menu as described in the Windows documentation.

To print a graph, first highlight topics and graph them as described above. On the **Graph** screen, select the **Print** button. A dialog box for your printer will appear. Click **OK** to initiate printing or set up print options as required.

Viewing Improvement Resources

Select **Recommendations** from the **View** menu. Alternatively, you can click on the "**lightbulb**" toolbar button. The Recommended Titles screen will appear. ***To get recommended resources, you must first select scored topic areas from the Results view.***

Choosing a Resource Library

Select the Library menu from the Recommendations view. A list of available libraries will appear. Each time you select a library from the list, a checkmark appears next to the library name. If you select the library a second time, the checkmark disappears indicating that the library is no longer selected.

Note: If you have just installed the program and select a library for the first time, a dialog box will appear informing you that a new library has been detected and that Team Assessor 2.0 needs to examine its contents. This examination can take anywhere from a few seconds to several minutes depending upon the size of the library and the speed of your computer. The examination each library is a one-time occurrence that happens only when you have installed a new assessment. Click on OK to allow Team Assessor 2.0 to examine the library.

Viewing Recommended Titles

Once you have selected one or more Resource Libraries, click on the **Get Recommendations** button at the bottom of the screen. One or more libraries will appear on the Recommended Titles screen. If a library is preceded by a "+", double-click on it to see the titles of recommended resources.

Titles are listed in order of their expected usefulness. Titles most relevant to improving low scoring areas of the assessment will be near the top of the list, with less relevant titles farther down the list. Team Assessor 2.0 calculates the relevance of each resource by comparing its content against your assessment score profile. Team Assessor 2.0 selects resources that offer you the greatest opportunity to improve your scores.

If you change scores on assessment questions, you must click on the **Get Recommendations** button again to get resources based on the new scores.

Team Assessor 2.0 recommendations are based on the topics that you have highlighted on the Results view. If you highlight the overall assessment, Team Assessor 2.0 will recommend resources to help you improve your scores on all topics. If you highlight just a single topic, Team Assessor 2.0 will concentrate only on that topic when searching its database of improvement resources. *You must highlight at least one topic on the Results Screen or Team Assessor 2.0 will not generate any recommendations*.

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Searching Resource Libraries by Keyword

You can use Team Assessor 2.0 as an online research tool by searching its resource libraries for topics of interest -- independent of your assessment score profile. Click the **Find** button at the bottom of the Recommended Titles screen. The Find dialog box will appear.

Type in a word or short phrase of interest. Then click on **OK**. Team Assessor 2.0 will search the contents of all of the resource libraries that you have selected, looking for the word(s) you typed. The titles of resources that contain the search word(s) somewhere in the title or text of the resource entry are displayed in the Recommended Titles list.

If more than one screen of matching resources are found, a dialog box with a **Find More** button will appear. After examining resources on the first screen, you can click on the **Find More** button to display more matching resources.

Viewing Detailed Resource Information

Highlight one or more titles by single-clicking on them. Then select the **Examine Resource...** button to see detailed information on the resource. If you have highlighted more than one resource (or if you have highlighted the name of the resource library in the Recommended Titles list) then you can click on the **Next** button on the Recommended Resource screen to view details for each of the titles you highlighted**.**

Printing Resource Information

 Print the detailed information on a resource by selecting the **Print** button on the bottom of the Recommended Resource screen. Print the list of recommended resource titles by selecting **Print** from the **File** menu on the Recommended Titles screen. When the Print dialog box appears, click **OK** or specify printing information as may be required. You can set up your printer by selecting the Print Setup option from the **File** menu.

Other Features

Team Assessor 2.0 allows you to edit comments and enables some customization of the interface and assessment.

Editing Functions

When you are typing text in a comments box on the assessment screen, the options on the Edit menu become enabled. The Edit menu offers the following commands:

      Undo   Reverses previous editing operation.
      Cut   Deletes data from the document and moves it to the clipboard.
      Copy   Copies data from the document to the clipboard.
      Paste   Pastes data from the clipboard into the document.

You can use these functions to paste approximately five to seven pages of unformatted text into each comment box from other Windows applications, such as a word processing program. See the Windows documentation for detailed information on using the clipboard.

Toolbar and Status Bar

The Toolbar is the row of icons that appears just below the menu bar at the top of your screen. The "disk" icon saves your work. The "**AB**" icon takes you to the Assessment view. The "**graph**" icon takes you to the Results view (from which you can graph results if you like). The "**lightbulb**" icon takes you to the Recommendations view. The "**question mark**" icon brings up online help for Team Assessor 2.0.

The Status Bar is the message area that appears at the bottom of your screen. The left area of the status bar describes actions of menu items as you use the arrow keys to navigate through menus. This area similarly shows messages that describe the actions of toolbar buttons as you depress them, before releasing them. If after viewing the description of the toolbar button command you do not wish to execute the command, then release the mouse button while the pointer is off the toolbar button.

The right areas of the status bar indicate which of the following keys are latched down:

CAP   The Caps Lock key is latched down.
NUM   The Num Lock key is latched down.
SCRL   The Scroll Lock key is latched down.

You can choose to hide the Status Bar or Toolbar by selecting the **View** menu and clicking on the either the **Status Bar** or **Toolbar** option to remove the checkmark. Select the option again to replace the checkmark and to reactivate the display of the Status Bar or Toolbar.

Tips on Using Microsoft Windows

One advantage of Microsoft Windows is the ability to run several applications at once in separate windows, and to resize these windows. If you are unfamiliar with Windows you may want to read about the following topics in your Windows manual:

Minimizing Windows   Moving Windows
Maximizing Windows   Using Scroll Bars
Sizing Windows   Switching Between Windows.

Note: If you are using Windows95 be sure your system is configured to enable you to see the entire Team Assessor 2.0 screen. Otherwise, you may need to use the scroll bars to access buttons that are on the bottom of the Team Assessor 2.0 screen.

Compatibility with Smart Assessor

Because Team Assessor 2.0 is a more sophisticated product, any assessment created using Smart Assessor can also be viewed, edited, and merged using Team Assessor 2.0. However, files created with or saved in Team Assessor 2.0 **cannot** be viewed or edited using Smart Assessor. Organizations using combinations of Smart Assessor and Team Assessor 2.0 software can use Smart Assessor to allow smaller groups to conduct self-assessments. Team Assessor 2.0 can be used to merge the many assessments created with Smart Assessor into one overall assessment.

Customizing the Assessment

There are three levels of assessment customization:

1. Simple customization by adding notes to the assessment.

2. Full service assessment customization, or new assessment development, by IQ Company's experts in survey and assessment design. Please contact IQ Company at 800/720-6755 or 408/475-4260 for information about customization.

Here is the process for simple customization via adding notes to assessment questions and help files.

a) Start a new assessment.

b) Add your notes as the first entry in each comment box for all questions that have comments boxes.

c) Open the assessment help file by selecting it from Team Assessor 2.0's **Help** menu on the Assessment screen. Go to the topic(s) in the Help file that you wish to customize by adding your notes. Select **Annotate** from the **Edit** menu within the Help window. The Annotate dialog box will appear. Type your notes into the box. Click on the **Save** button when you are done. The dialog box will disappear and a green paperclip icon will appear in the upper left corner of the topic. If you double-click on the paperclip, your annotation will reappear. Your annotation becomes a permanent part of the help file until you delete it by choosing the **Delete** button in the Annotate dialog box.

d) Save the assessment without any entering any score information.

e) Specify that all assessors should open your saved assessment instead of starting a new assessment. They can enter their comments after reading your notes and annotations. They should save their assessment (using the Save As command) under a different name, so that your assessment remains a clean, annotated template.

IQ Company Contact Information

If you need further assistance, or if you have questions about other IQ Company products, including custom assessments, please contact us at:

Phone: 1-800-720-6755 or 408-475-4260

Fax: 408-479-7623

Email: iqinfo@iqco.com

Website: http://www.iqco.com

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   Santa Cruz, CA 95062

Feedback and suggestions for improvement are always welcome.

Thank you for using IQ assessment software!