

*Professional Development and Appraisal System (PDAS)
Region III ESC PDAS Software Quick Start Guide*



Single-User Version

Please Note: You MUST have FileMaker Pro 5.5V2, 6.0 or 7.0 installed prior to installation and use of PDAS Software.

Updates for PDAS Software available at www.esc3.net/appraisal

Opening the File

Open **PDAS** (shortcut on desktop)

Enter the password (**A**) and click **Continue** (the password is not case-sensitive)

Navigation in the PDAS Software is controlled by the buttons on each menu and screen. Most of the native FileMaker menu options are disabled.

Creating a New Appraisal Record (Only create one appraisal record per teacher)

Click **Create** at the Main Menu

Enter a unique Teacher Number (SS # is recommended**) and click **Continue**.

Enter the Teacher and Appraiser info in the boxes at the top of this new blank record.

Use the Tab key to move from field to field on each screen or point and click the mouse in the appropriate field.

Make sure the Year is correct

Click **Create** (button on lower right side of Domain I only or button on PDAS Main Menu) and repeat steps above to enter additional appraisal records.

Click **Menu** to return to the Main Menu.

****The Teacher ID may be suppressed from printing on any reports.**

The yellow label at the top of the Main Menu indicates the current status of the print ID flag.

To change the status click the yellow button "**Print Teacher ID on Forms**" (on right of menu) once. To change the flag back, click the "**Print Teacher ID ..**" button again. It is a toggle that may be changed as needed. It only affects printing – not the screen displays.

Scoring Domains (Teacher appraisal record must exist prior to scoring – Create)

****This is the routine function to update teacher appraisals throughout the year. This same record is the Observation Summary report throughout the year and becomes the Summative report at the end of the year by updating any scoring and changing the record field type from Observation Summary to Summative Annual on the header information of Domain I for each teacher appraisal record.*

Click **Score** at the Main Menu

Click **Find** at the Find Screen

(if no criteria are entered on the Find screen, then all records created will appear in the found set)

Navigate to the desired record

(use the four "arrow" buttons (first, previous, next, last) on the right above the Domain buttons. Above the navigation buttons is information on the current record, found records and total records in the system.)

Click to select the record type (Observation Summary or Summative Annual Appraisal)

Enter Times (with a space before the am or pm) and the Date (mo/day) for the appraisal

**Professional Development and Appraisal System (PDAS)
Region III ESC PDAS Software Quick Start Guide**

Single-User Version

Scoring Domains (continued)

Click the “domain” you wish to score using the **I, II, III, IV, V, VI, VII, VIII** buttons to move to the appropriate domain for the current teacher displayed.

To enter a score, double-click on the appropriate box beside the criteria and a check mark is created.

To delete a check mark, double-click on the box and then press the Backspace/Delete key on the keyboard
(*same process as deleting a mistyped key when word processing*)

Click the respective **I, II, III, IV, V, VI, VII, VIII** button on the right to subtotal the current domain
(*a subtotal will only appear if all criteria are scored on the domain*). If a domain is scored, then the ‘X’ disappears in the box next to the Domain roman numeral on the scoring screens to indicate the domain is completely scored.) See Notes below for special circumstances related to Domain VIII.

Enter info in the Comments, Strengths, and Areas to Address Sections

(*Info that wraps more than one line below the box on the screen will not print*)

Click **Menu** to return to the Main Menu

****Note 1: Domain VIII – Criteria 10 must be rated for indicator A and B if this record is flagged New Teacher. If Criteria 10 does not have any ratings, then Domain VIII will not calculate a final score. If the New Teacher flag is marked – the total will not include the score from Criteria 10 – it is reported only.**

Domain VIII – Criteria 10 is not marked for indicators A and B for records flagged as New Campus.

****Note 2: Teachers that will be reported only for Domain VIII are flagged on Domain VIII at the New Teacher button. This is a toggle button, click to select the button and click then backspace (or delete) twice to remove the selection.**

****Note 3: For PDAS on a New Campus, mark all teacher Domain VIII records to the right of criteria 10 as New Campus. This is a toggle button, click to select the button and click then backspace (or delete) twice to remove the selection.**

Updating Appraisal Records

Click **Score** at the Main Menu.

Enter the Find criteria and click **Find**.

Make the changes needed (This includes any of the teacher demographic information).

Deleting an Appraisal Record (deletes the appraisal record and any related cum data records)

Click **Score** at the Main Menu.

Click **Find** at the Find Screen.

Navigate to the desired record.

Click the **Delete** button.

Click **Yes** and then **Delete**.

Click **Menu** to return to the Main Menu.

**Professional Development and Appraisal System (PDAS)
Region III ESC PDAS Software Quick Start Guide**

Single-User Version

Enter Cum Data

***This area is to record walkthrough documentation and reporting.*

Click **Cum Data** at the Score screen OR use **Cum Data** from the Main Menu to navigate to a **cum data input** screen.

*If data is displaying in the cum data details entry window and you want to create a NEW cum data record:
Use the scroll bar on the right of the cum data entry to scroll to the bottom of the records – a blank record should be in the display before you proceed to create a new cum data memo.*

Click the box under **Domain** and select from the list

This creates the cum data record – a memo number is assigned and appears in the display box at the bottom of the screen.

Enter criteria number & press tab key.

Select Prior Rating from list.

Select Current Rating from list.

Enter date (mo/day) & press the tab key; enter time (with a space before the am or pm) & press tab; enter comments.

Click **Recommended Action** to enter detail narrative data.

Click **Spell** to check Spelling (*this feature works only if the FileMaker dictionary is installed.*)

Click **Return** to return to Cum Data screen.

Click **Score** to return to the Score screen.

Click **Menu** to return to the Main Menu.

Printing Memos (Cum Data)

Option 1 – From within the appraisal record.

Click **Score** at the Main Menu.

Enter the Find criteria and click **Find**.

Click **Cum Data** at any Score Domain screen.

Click the desired **Memo #** in the lower section of the screen.

Click **Spell** to check spelling.

Click **Print**.

Click **Yes** to print only this Memo, click **OK** and **Print**.

Click **PDAS** to return to the Cum Data screen.

Click **Main Menu** to return to the Main Menu.

Option 2 – From the Main Menu.

Click **Cum Data** at the Main Menu.

Click **Listing** on the Cum Data Menu and enter the find criteria or leave blank to see all memos, click **Find**.

To print all memos displayed in the list, click the **Print** button at the bottom of the screen.

To print individual memos, click the **View Memo #** box for the specific memo desired.

A full screen display of the memo will appear, click **Print**.

Click **Cum Data Listing** to return to the previous listing of memos found OR

Click **Menu** at the bottom of the screen to return to the Cum Data Menu.

Click **Main Menu** to return to PDAS Main Menu.

*Professional Development and Appraisal System (PDAS)
Region III ESC PDAS Software Quick Start Guide*

Single-User Version

Printing Appraisal Reports (Observation and/or Summary reports)

Click **Reports** at the Main Menu.

Enter Find criteria and click **Find**.

Click **Spell** to check spelling.

Click **Print Short Form** to print the short form (2 page TEA approved format).

Click **Print Long Form** and then **Print** to print the long form (5 page standard format).

Click **Menu** to return to Main Menu.

Changing Password

(Wait...Don't do this until you are comfortable with the software.)

Click **System** at the Main Menu.

Click **Edit Password** at the Systems Menu

Click on the password field and highlight the word Edit...

Delete the current password.

Enter a new password (Write it Down!) & click **OK**.

Click on the password field and highlight the new password.

Click **Menu** to return to Systems Menu.

Enter the new password and click **Continue**.

Click **OK** in the Password Validate box.

Printing a Teacher Roster

Click **System** at the Main Menu.

Click **Roster** at the Systems Menu.

Click **Sort Name** to sort by Last Name OR **Sort T Num** to sort by Teacher Number.

Click **Print** to print a roster.

Click **Menu** at the Teacher Roster page.

*Professional Development and Appraisal System (PDAS)
Region III ESC PDAS Software Quick Start Guide*

Single-User Version

Backup Utilities

Click **System** at the Main Menu.

Click **Backup**.

If you want a backup of your appraisal records and cum data, click **Yes** at the next message.

When it is complete two files (*Bkuppd* and *Bkupcd*) are created in the PDAS folder.

Bkuppd contains all PDAS scoring information.

Bkupcd contains all cum data information. (only created if cum data exists)

To copy these backup files onto another drive follow the appropriate copy commands below:

Windows

Open **My Computer – C: - Program Files**.

Open **PDAS** folder.

Locate the *Bkuppd* file; RIGHT mouse click on the file and **Copy**.

Locate the drive (folder) you are moving a copy of the files to and RIGHT mouse click on the drive (folder) and **Paste**.

Repeat the previous two steps for the file *Bkupcd* (if it exists).

Macintosh

Open your hard drive and locate the **PDAS** folder.

Open the **PDAS** folder

Copy the *Bkuppd* file to the backup location (drive:folder) by “drag and drop”.

Copy the *Bkupcd* file to the backup location (drive:folder) by “drag and drop”.

Restoring Backups

Locate your backup copies of files *Bkuppd* and *Bkupcd*.

Copy these files into the **PDAS** folder on your computer (Windows – in the Program Files) (Macintosh – on your hard drive).

Open **PDAS** program. (shortcut on desktop).

Click **System** at the Main Menu.

Click **Restore**.

You will be prompted twice to restore the backup data and overwrite any data in your system. This process does not append information – it replaces it!

“You are about to restore data from your backup. Do you want to continue?”

“Current data in the files will be replaced with the backup data. Do you want to continue?”

Click **Yes** to both prompts to complete the restore process.

Return to the **Main Menu** and verify your data is in the system through either **Score** or **Reports**.

**Professional Development and Appraisal System (PDAS)
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Single-User Version

Reset Files for New Year

****This utility is used at the beginning of a new appraisal year if you are using the same version of PDAS or have data existing in your files.*

All teacher appraisal records will be reset for the next year (verify the year rolls forward). Scoring and Cum Data details will be erased from each teacher appraisal record.

Maintenance of the appraisal records should be completed prior to scoring any teachers for new year by:

- *Delete appraisal records for teachers no longer at the campus*
- *Create appraisal records for new teachers*

Click **System** at the Main Menu.

Click **Reset Files for New Appraisal Year**

Two prompts will be given to verify you want to proceed.

“You are about to clear all appraisal documentation and reset the files for the next appraisal year. Do you want to continue?”

“All cum data and scoring will be erased. Do you want to continue?”

Click **Yes** at each prompt to reset the files OR click **No** to exit the process and leave the data unchanged.

If records exist, upon completion of the reset – all appraisal records are in the found set and the system opens the Score screen.

Transfer Data between versions/installations of PDAS

Backup data in the original PDAS system (per process above)

Install new PDAS system (verify the installation is not overwriting the existing PDAS installation – a difference directory)

- EX. - PDASW6 is the original PDAS directory
- PDASW7 is the new PDAS installation directory

Copy **Bkuppd** and **Bkupcd** files from original PDAS directory to the new PDAS directory.

Open the new PDAS system and Restore the Backup (per process above).