# Promonitor User guide #0: A Basic Overview of the ProMonitor Interface

**Accessing ProMonitor**

To get to ProMonitor or the training system, either:

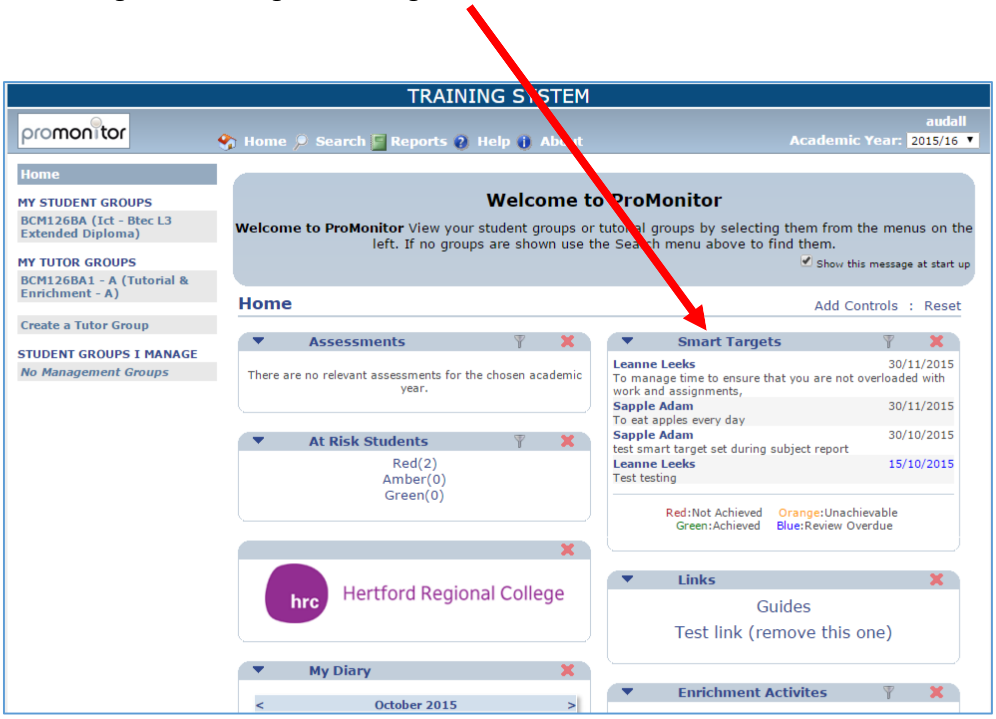
- Go to Staffnet and click on the ProMonitor button:


- Click the link in the Staff Links section of Moodle:

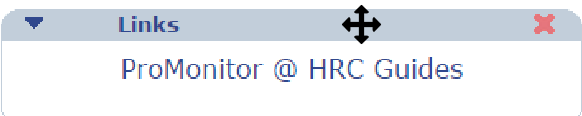

The first thing you will see when you access ProMonitor is the dashboard (pic below).
This acts as a hub to all of ProMonitor's features, and provides notifications to the user based on the current status of their learners e.g. outstanding Smart Targets.

Most of the links you see on this page can be ignored for now, and will come into use later down the line.

For the time being, we are just focusing on what we need to do.

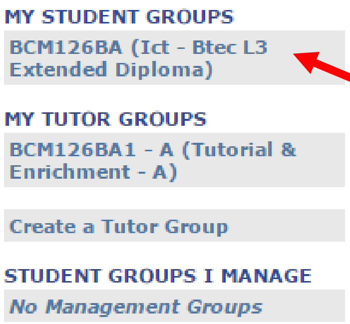



We recommend moving the 'Links' box to the top of this page, as this will be used most frequently to start.




This can be done by clicking and dragging the blue section at the top of these boxes.

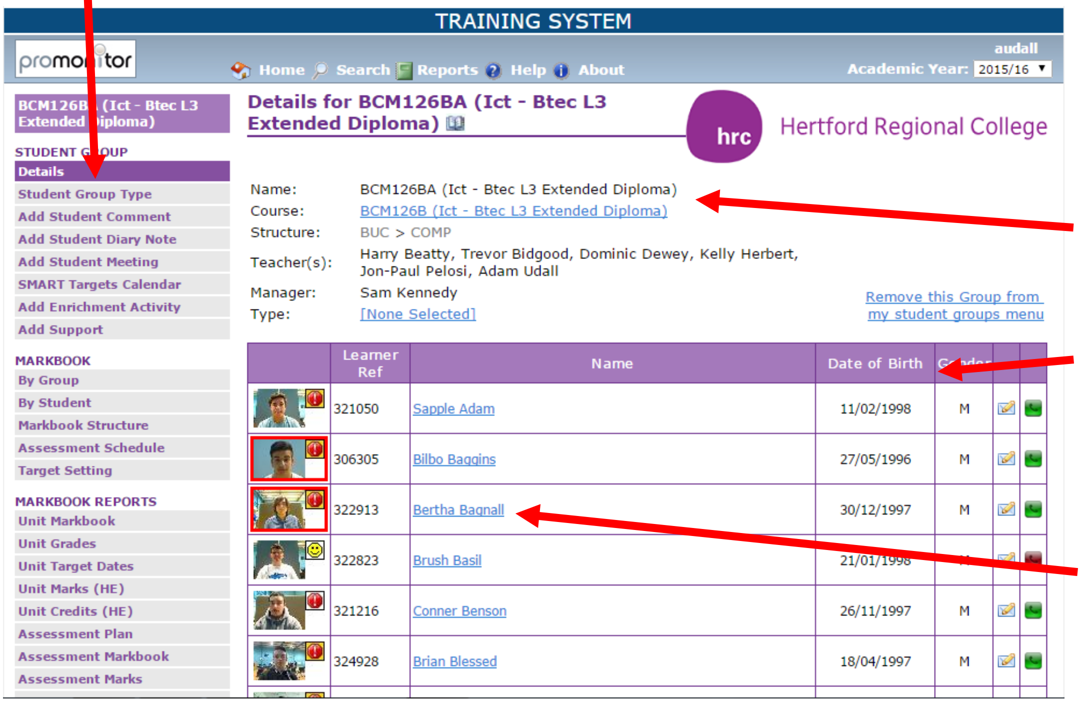
On the left hand side of your dashboard will be a list like this:




Groups that you are timetabled to teach will appear here

Clicking on a Student Group will take you to the following page

Once again, there will be a lot of irrelevant links - You can just ignore these.




This is the page for this particular Student Group. The course is 'BCM126B'. The group is 'A'.

Student Group pages always have a purple colour scheme.

Clicking on a student's name will take you into their ILP.


An ILP page always uses a reddish-brown colour scheme, and will look like this:

ILP pages give you more detailed information about a specific student and will be used regularly during 1:1s and Progress Reviews, (from Phase 2: January 2016 onwards).

In the top right of a learner's ILP page is a red X button. This can be used to return to the student group page.


**This is an initial guide that only covers the basics of navigating ProMonitor. This guide will be updated when further processes are to be completed in ProMonitor (January onwards).**

**Promonitor User guide #1: Check / Update Risk Indicators for each student in a group**

**Completed by: Course team (in Course Team meetings)**

**When: Every 2 Weeks starting 4th November (18th Nov, 2nd & 16th Dec)**

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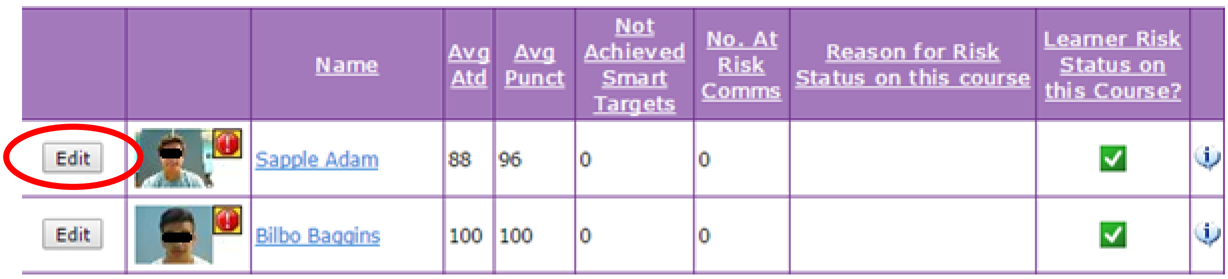
To check or update the Risk Indicators for the students in a group, you must first select that student group. To do this, click the link to the group on the left hand side of your dashboard (under “My Student Groups”).


The last letter of the code indicates the specific group e.g. BCM126B**A**

This will take you to the Student Group page. Next, find and click “Risk Indicators” (under the “General Reports” heading on the left hand side.


You now see the Risk Indicators page. If a student’s Learner Risk status (or reason for it) needs to be changed, click the edit button to the left of their picture.



You can then change the status and, in the 'Reason for this risk' box, explain why. (There is a Risk Indicator Status Key at the bottom of the page to show you what the different colours mean.)

| | | Name | Avg Atd | Avg Punct | Not Achieved Smart Targets | No. At Risk Comms | Reason for Risk Status on this course | Learner Risk Status on this Course? | |
|---|---|---|---|---|---|---|---|---|---|
| Update Cancel | | Sapple Adam | 88 | 96 | 0 | 0 | | | |

**Risk Indicator Status Key:**

| | |
|---|---|
| ! | High Risk |
| ? | Medium Risk |
| ✓ | No Risk |
| ★ | Outstanding Performance |

Once you've changed a student's risk status/reason, click 'Update' next to their picture to save the change. **You must click on Update after each individual student before you edit the next.**

| | | Name | Avg Atd | Avg Punct | Not Achieved Smart Targets | No. At Risk Comms | Reason for Risk Status on this course | Learner Risk Status on this Course? | |
|---|---|---|---|---|---|---|---|---|---|
| Update Cancel | | Sapple Adam | 88 | 96 | 0 | 0 | test | | |

Once you are happy no further changes need to be made (note: it's possible you may not need to make *any* changes), go to the bottom of the page and click the "Checked" button on the right hand side. This must be clicked even if you haven't made any changes as it confirms with system the last time the risk indicators were checked.

Checked

*Last checked: 13/10/2015 14:58:00*

Reminder: You can access Promonitor (and the Training System) via the icon on StaffNet or in the staff links section of Moodle


**Staff Links**

ProMonitor
e-Learning Hub
elearning tips & guides
(inc. Moodle & ILPs)
Group Tutorial
Staff Development

# ProMonitor User Guide #2: **Changing Overall RAG**

## Completed by: **Personal Tutor**

## When: **In One to Ones, Progress Reviews or Ad-Hoc**

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The Overall RAG is a Red, Amber, Green rating set by the Personal Tutor.

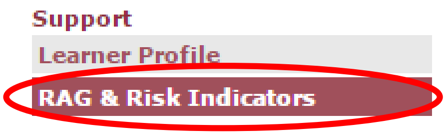
It is a reflection of the Student's performance across their programme of study and of their ability to remain on track. The Personal Tutor chooses the appropriate RAG rating, informed by the Risk Indicators for each programme of study element, and any pastoral issues, which may impact the Learner's ability to succeed.

To change the Overall RAG for a student, go to the student's ILP Page (reddish-brown).

The two main methods of accessing this page are:

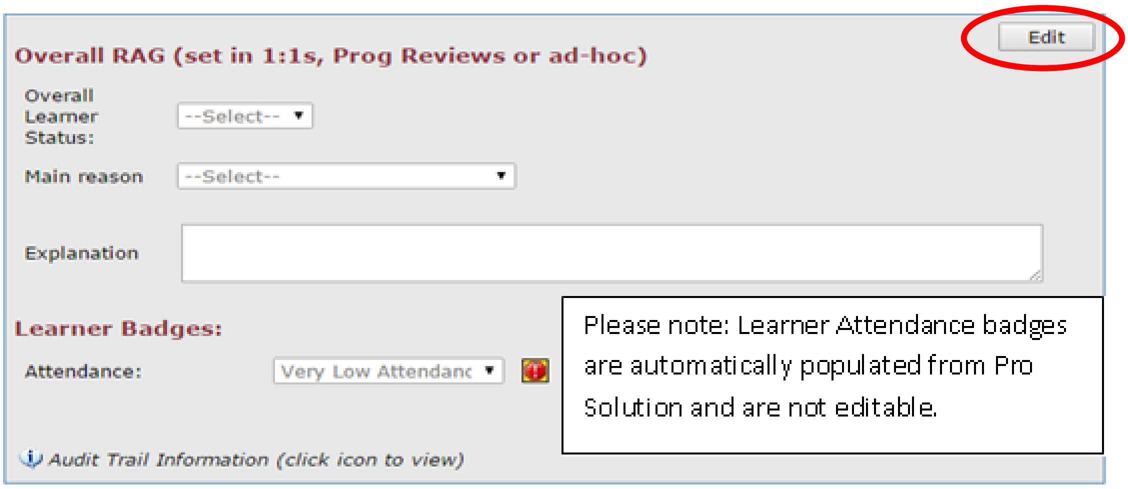
1. **Direct**: Homepage, Search by Student > Click Student Name
2. **Via Student Group**: Homepage, Student Group, Click Student Name

Once you're on the Student's ILP page, select "RAG & Risk Indicators" from the 'Support' section on the menu to the left.

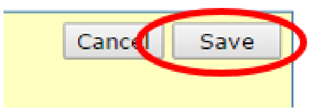



The next page is shown below, and this is where you set the student's 'Overall RAG'.

To change the Student's Overall RAG, click on edit in the top-right corner and set the status to red/amber/green and choose the most applicable option for the 'main reason'. (*If the student is green, you may want to set the 'main reason' to other.*) Remember to provide an explanation for the RAG given.




Once these fields have been completed, click the 'Save' button in the top-right corner to confirm the changes.



# ProMonitor User Guide #3: **Subject Reports**

## Completed by: **Subject Teachers**

## When: **2 Weeks Before Progress Reviews (November & February)**

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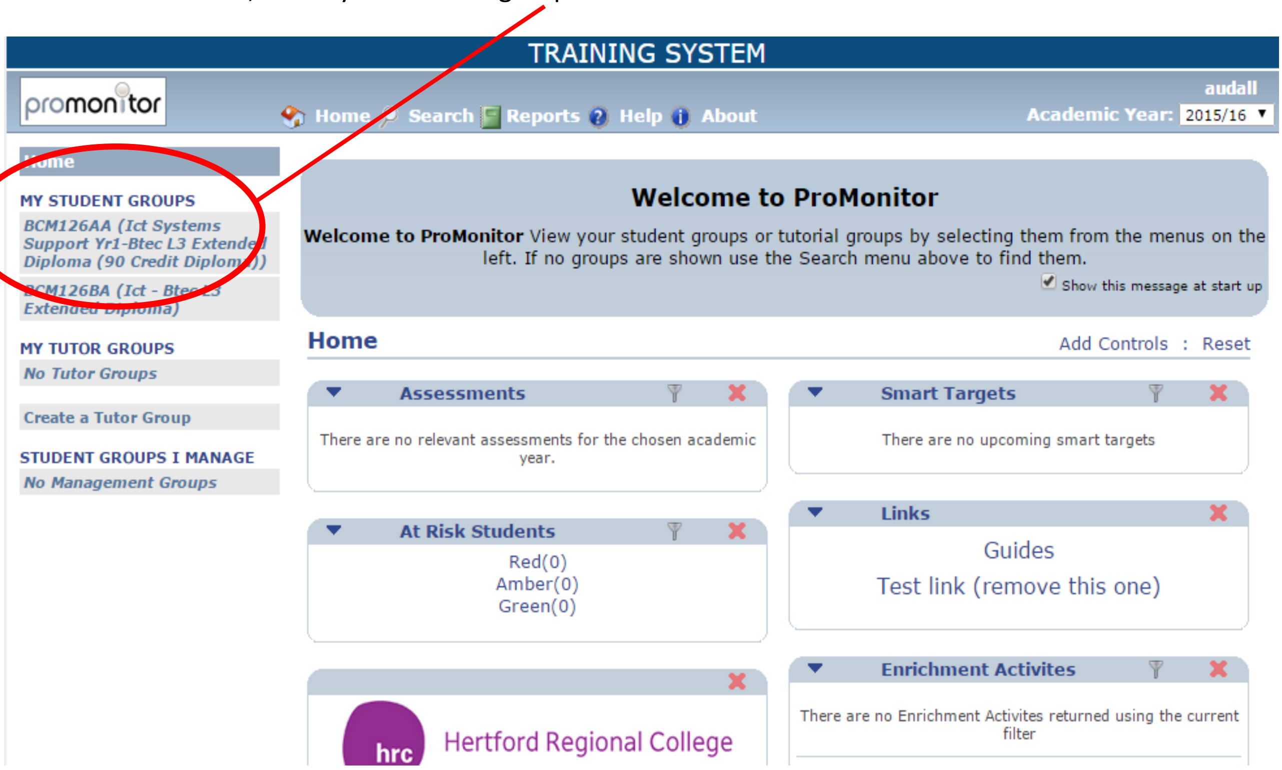
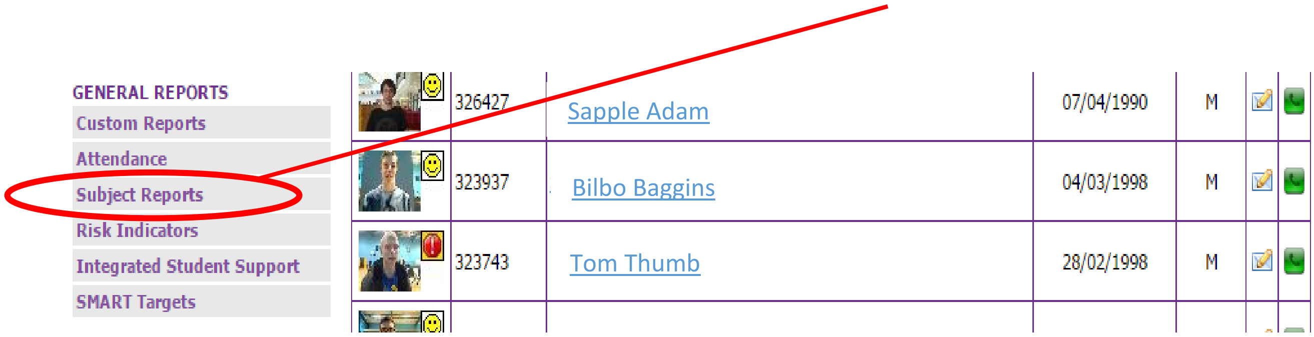
From the **Dashboard**, select your student group on the left hand side.

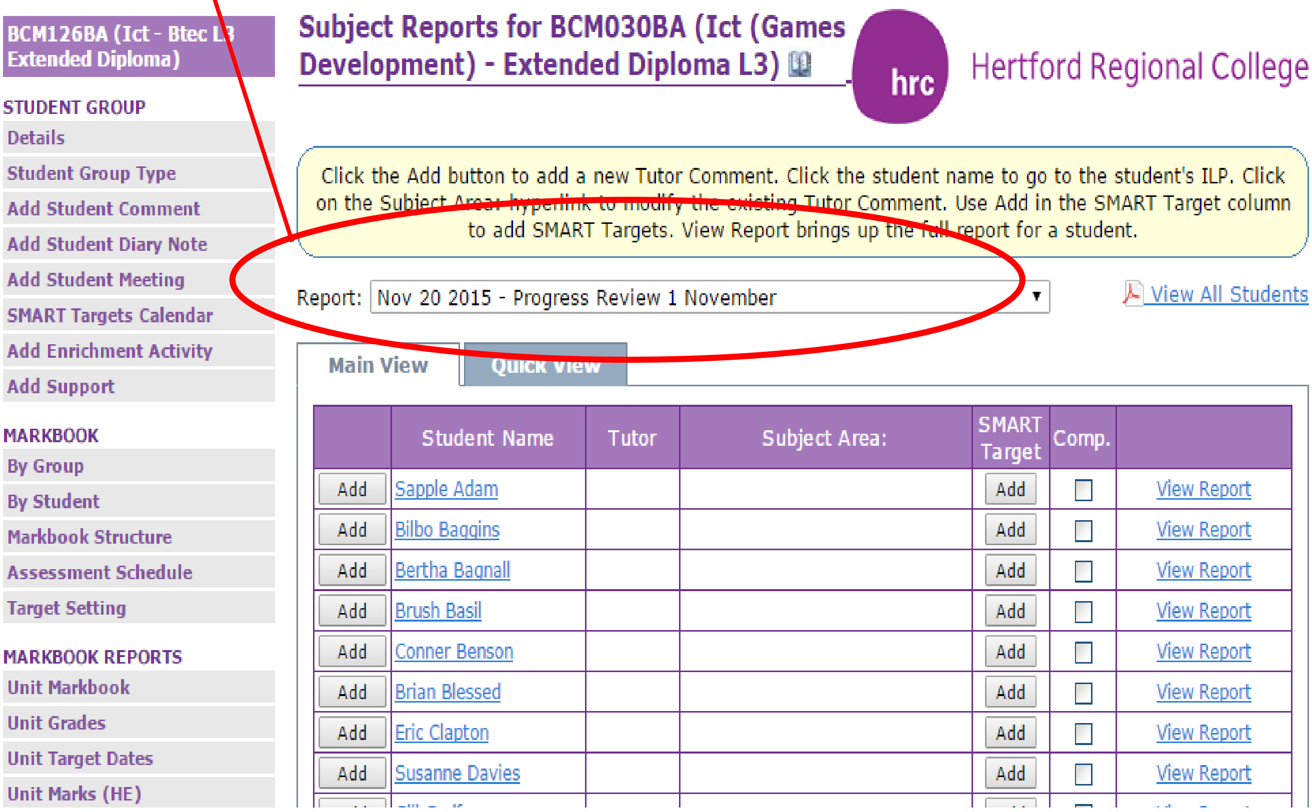



On the Student Group page, scroll down until you see '**Subject Reports'**



You will then be taken to the Subject Reports page. This is the **Main View** of this page.

**<u>From the Report dropdown, choose which Progress Review your Subject Report(s) will feed into</u>**

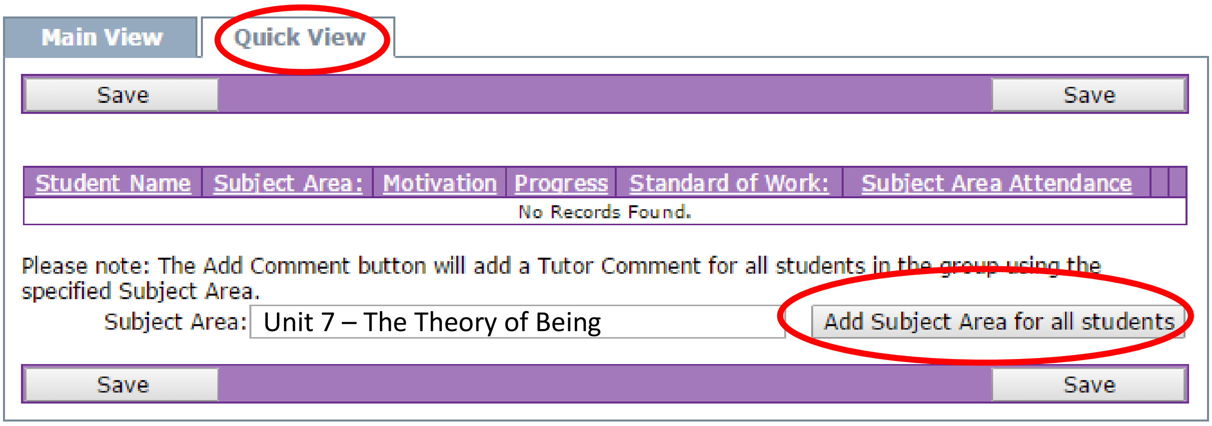



From this page you can complete Subject Reports in two ways:

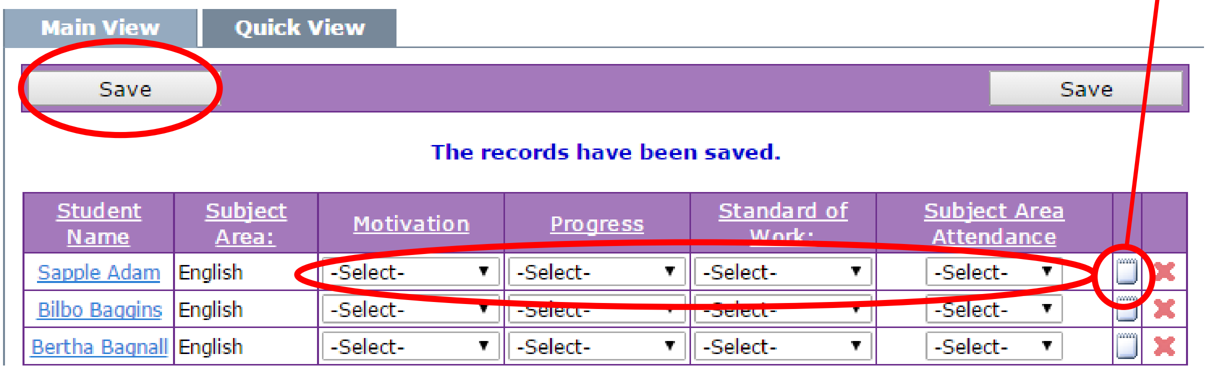
The first way will set up a subject report for each student in the group; the second way is useful if doing an ad-hoc report for an individual student.

1. **<u>Recommended: Whole Class Subject Report</u>**

Click the "Quick View" tab. Once on the Quick View page, type the subject you're reporting against into the "Subject Area" box, then click on the "Add Subject Area for all students" button.



This will generate a table with dropdown options next to each student (Motivation, Progress, Standard of work, Subject Area Attendance). Select the appropriate options for your first student then click the Notepad icon; this opens a box into which you should write a general comment/s for the report.

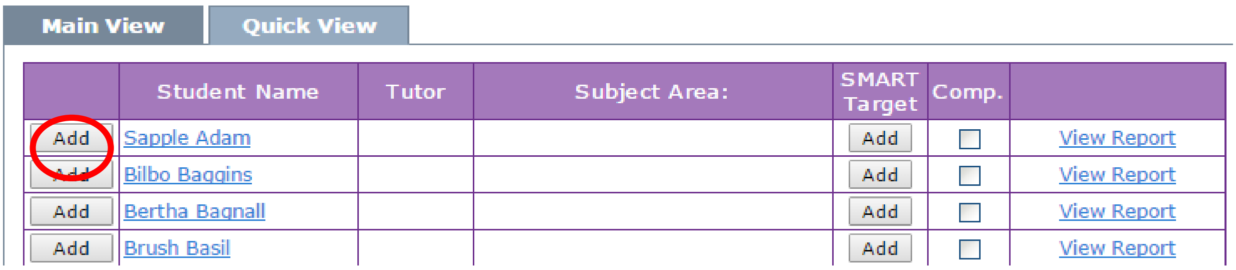



Once you've added your comment, close the box and click the 'Save' button at the top (or bottom) of the page. We recommend that you click the 'Save' button after completing each row.

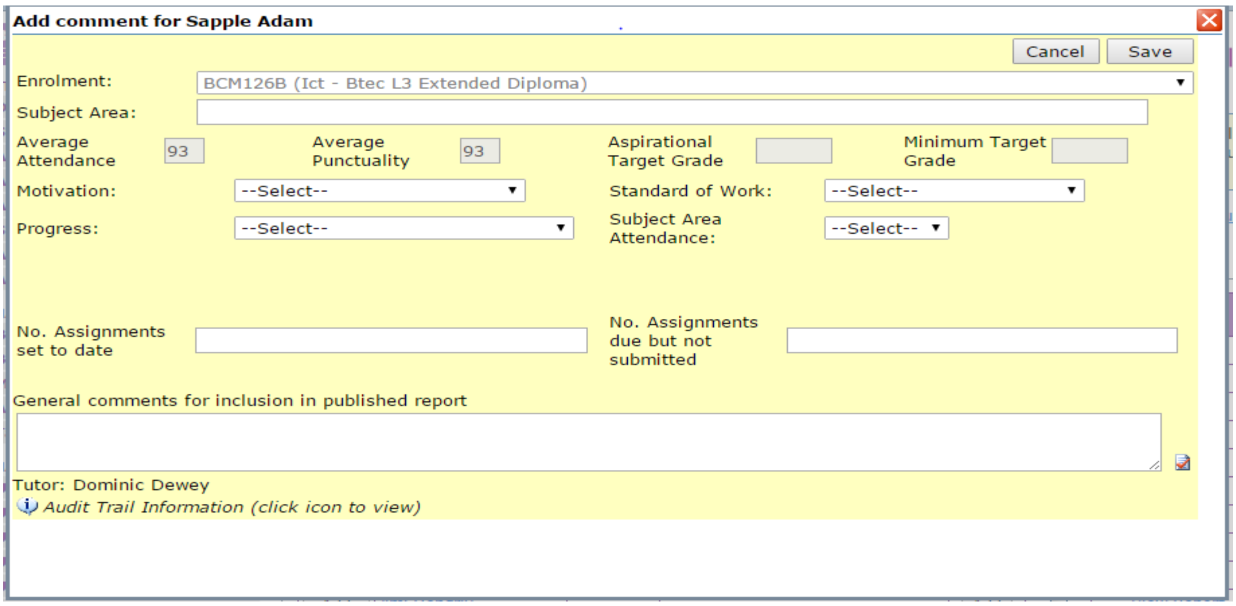
Next, add a SMART Target for each learner. This is done via the Main View tab (**see *SMART Targets* below**).

## 2. Optional: Individual Subject Report

On the Main view page click on the "Add" button next to the name to make a comment that will be included on the Individual Subject report.



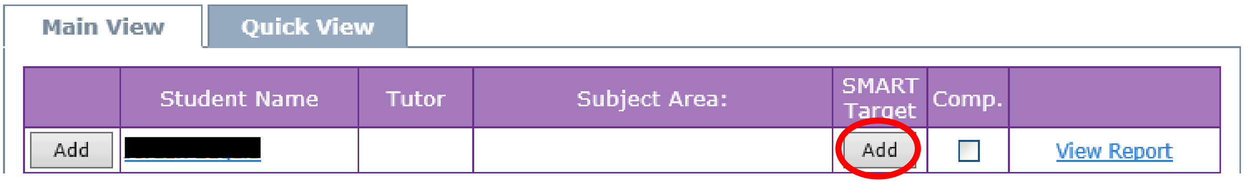

Clicking Add opens the following window so a Comment can be added. Select options from the dropdowns, add comments as applicable and click 'Save'.




Next, add a SMART Target for each learner. This is done via the Main View tab (see *SMART Targets* below).

**SMART Targets**

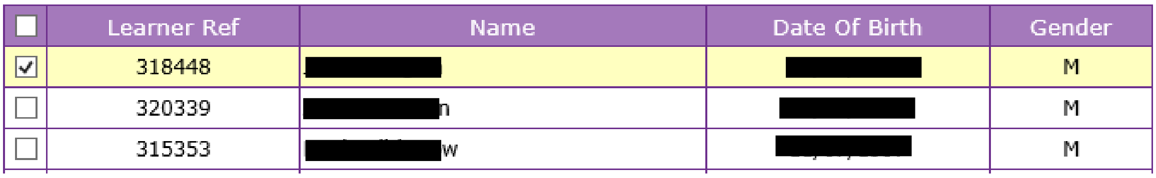
In the Main View tab, click on the "Add" button in the SMART target column.  This will allow you to add a SMART Target for that particular student.




In the window that pops up, click on 

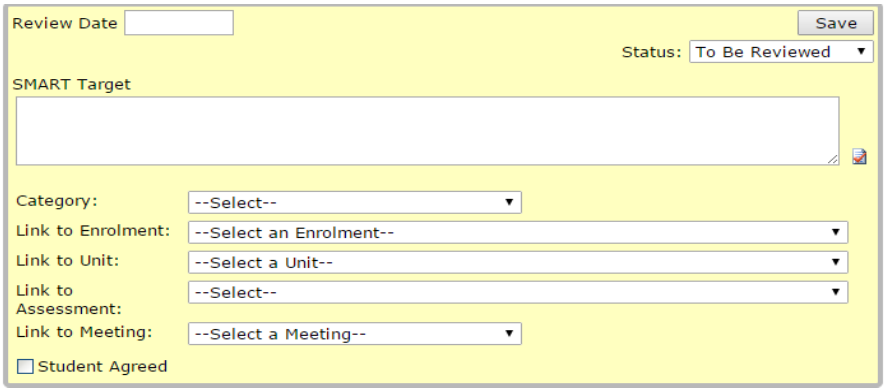
in the top left corner.

You will then see a list of students. The student you selected previously will have a tick next to them.




If the SMART target you are about to add will be relevant for multiple students, you can tick next to those students as well. This will add that same SMART target to the students you have ticked.

Once you have finished selecting students, scroll down and click on the next button at the bottom of the pop-up. Now fill in the fields for the SMART target.




**Review Date:** Enter when the SMART Target will be reviewed.
**Status:**  Set the current status for the target, e.g. to be reviewed, reviewed, achieved etc.
**SMART Target box:** Type the actual SMART Target here.
**Category:** What category does the target belong to? Academic, English or Maths?
**Link to enrolment:** If it is related, you can link to an element of the learner's POS, e.g. their main course, independent study etc.
**Lint to unit:** Is the target relevant to a specific unit?
**Link to assessment:** Is the target relevant to a specific assessment?
**Link to Meeting:** Here is where you select a meeting to attach the target to, such as a progress review (if a meeting is already confirmed).
**Students Agreed:** Has the student agreed to the target set?

Once the SMART Target is filled in, click 'Save' in the top right corner of the pop-up. This will add the SMART Target to the SMART Target page.

# Promonitor User Guide #4: **Set or update Ad-hoc SMART Targets**

## Completed by: **Personal Tutor, Subject Teacher, Learner**

## When: **Ongoing / Ad-hoc only!**

## IMPORTANT: **For details of how to add a SMART target within a Subject Report, Progress Review or One to One, see the relevant guide.**

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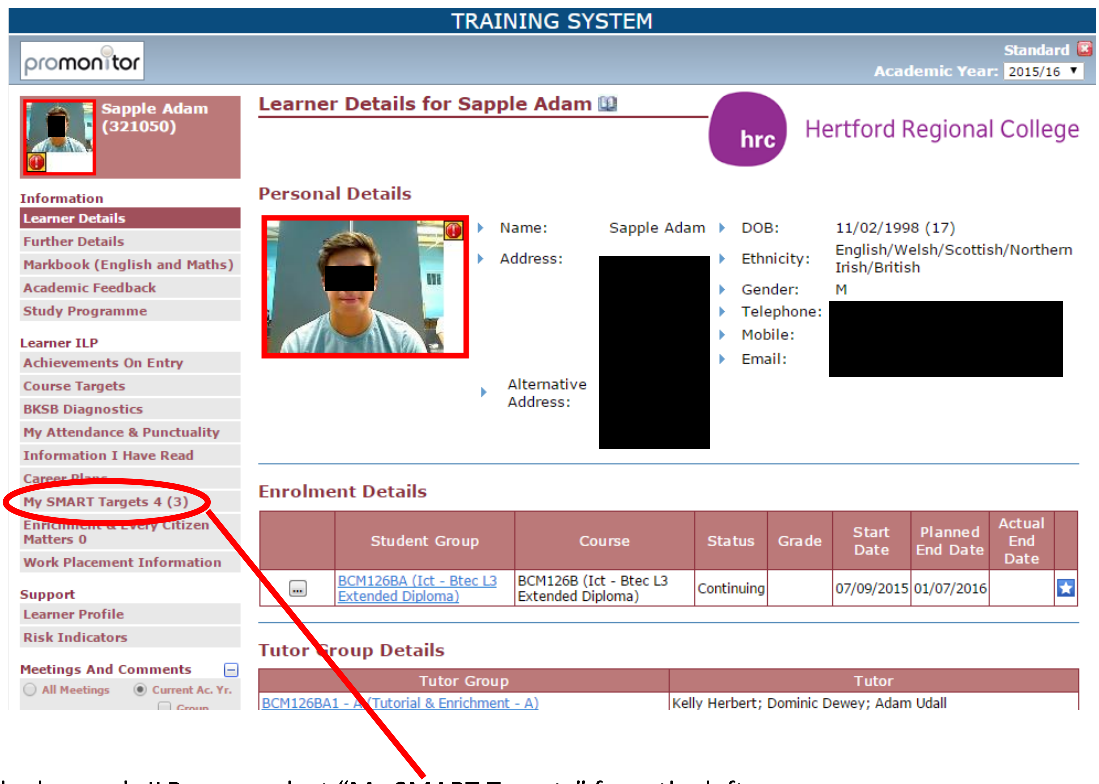
To set or update an ad-hoc SMART Target for an individual learner, go to the learner's ILP page.

To do this, go to the ProMonitor homepage. Hover over 'Search' and select Students.

Enter the surname of the student, click search.

Locate the Student on the list and click their name to open their ILP.

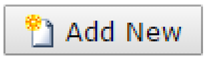


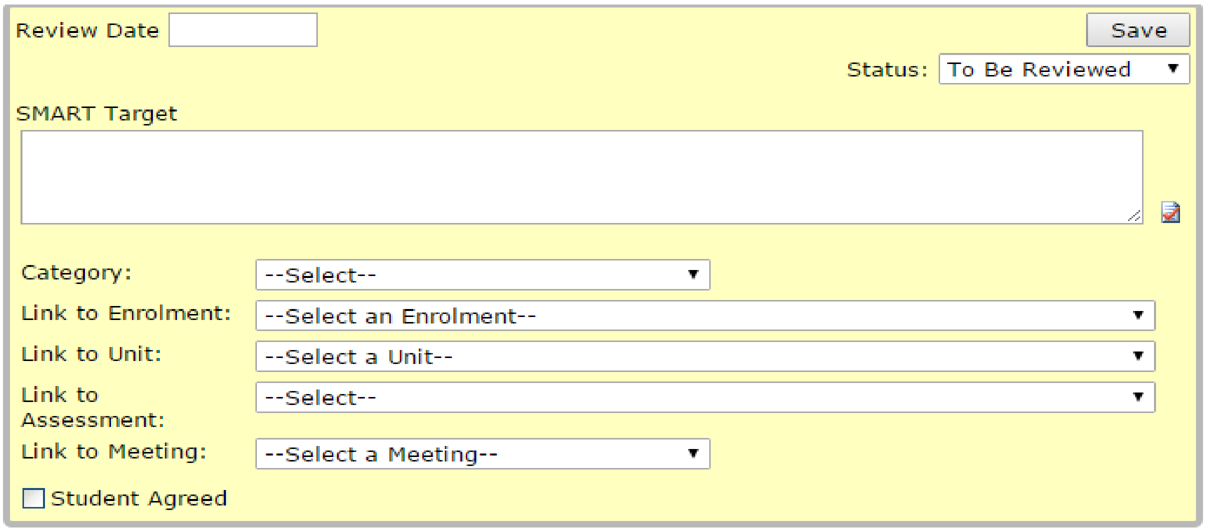

On the learner's ILP page, select "My SMART Targets" from the left menu.

This will take you to the SMART Target page where you can either add a new target or update an existing one.

## Adding a SMART Target

To add a SMART Target, click on the “Add New” button in the middle of the page and complete the fields:




**Review Date:** Enter when the SMART Target will be reviewed.
**Status:** Set the current status for the target, e.g. to be reviewed, reviewed, achieved etc.
**SMART Target box:** Type the actual SMART Target here.
**Category:** What category does the target belong to? Academic/Vocational, English or Maths?
**Link to enrolment:** If it is related, you can link to an element of the learner’s POS, e.g. their main course, independent study etc.
~~**Lint to unit:**~~ Ignore this for now
~~**Link to assessment:**~~ Ignore this for now
**Link to Meeting:** If you wish to, you can select a meeting to attach the target to, such as a progress review (if the meeting is already set up in ProMonitor).
~~**Students Agreed:**~~ Ignore this for now

Once the SMART Target is filled in, click ‘Save’ in the top right corner of the pop-up. Your saved SMART Target will now be attached to that learner.

## Updating a SMART Target

To update an existing Target, go to the SMART target page in the Student’s ILP.

If the target has been met, click on ‘Set Achieved’ to change the status to ‘achieved’.
To make any other changes to the target, click on the Edit button and make your changes in the SMART target pop-up. Clicking on ‘Delete’ will delete the target.


**Note:** The ‘Review Date’ at the top will be in red if the SMART Target is overdue.

# Pro Monitor User Guide #5: **Comments**

## Completed by: **All Staff**

## When: **Anytime**

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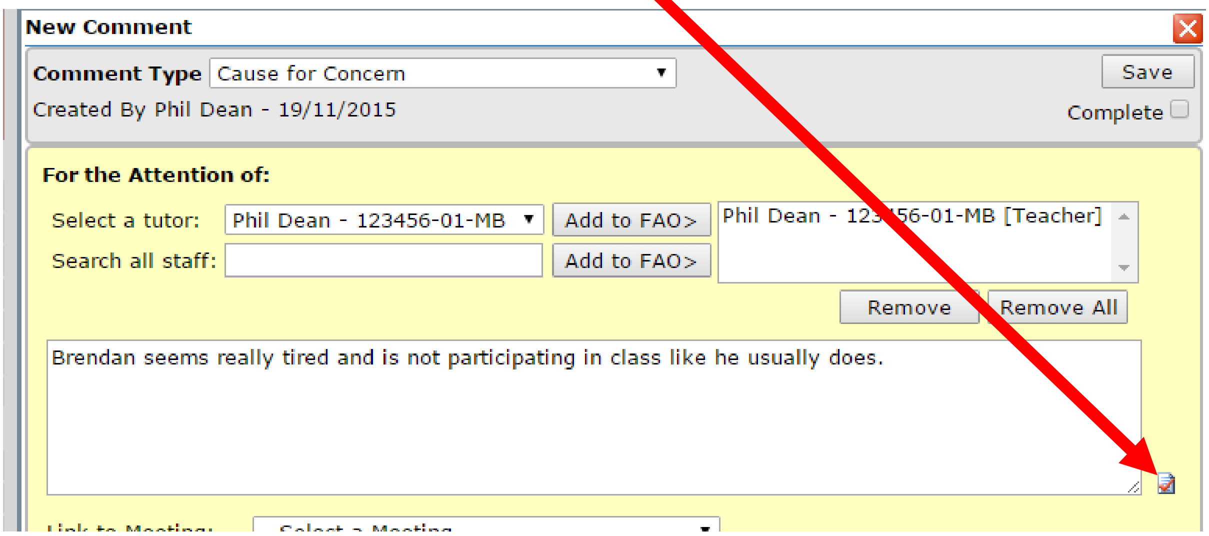
**Please note:**

a) **Students can request to see any of the information recorded about them at HRC.**
b) **Anything you enter into ProMonitor should be written with the assumption that it could be viewed in ProPortal by Students, Parents and Carers.**

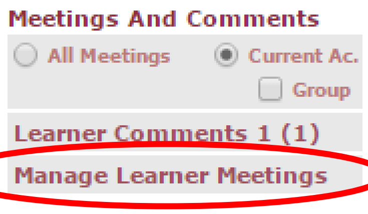
**When adding comments to ProMonitor, please click the spell checker before saving:**



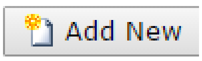

Comments can be added in two ways: Individually or by Group. It is also possible to make Comments within Subject Reports, One to Ones and Progress Reviews.

<u>**Individual Student Comment**</u>

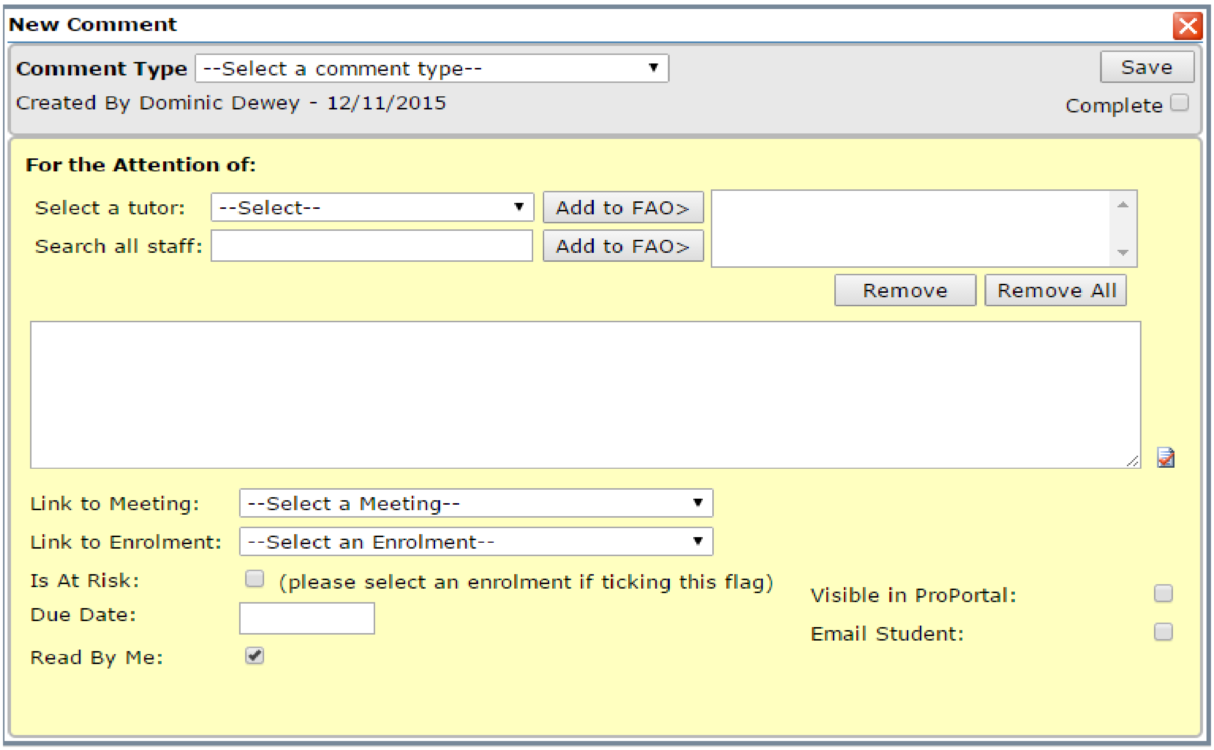
To add a comment for an individual student, open the Student's ILP page and select "Learner Comments" from the left menu under subheading 'Meetings and Comments'.



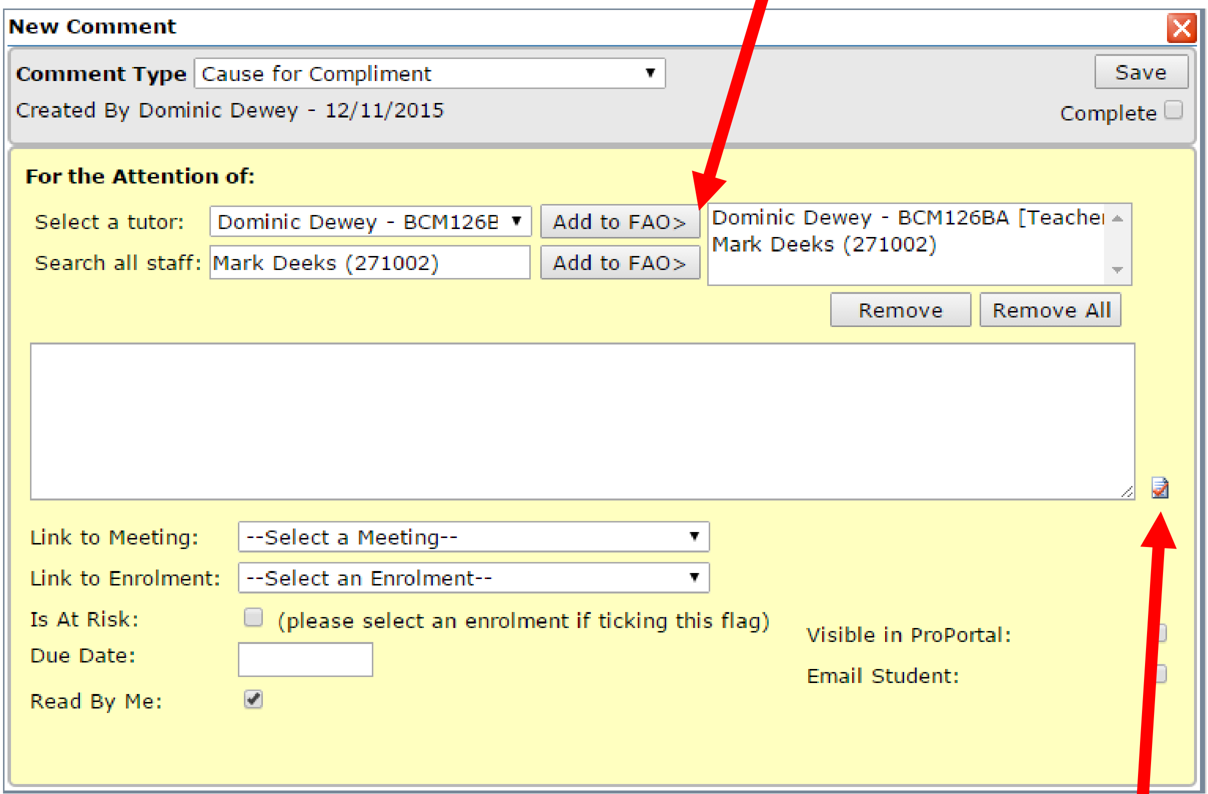

Click on the "Add New" button on the page which will open the comment box.



In the Comment box, first select the “Comment Type” from the dropdown at the top.




If the comment is for the attention of one of the learner’s tutors, select that tutor from the “Select a tutor” drop down and then click “Add to FAO”. If it’s for a member of staff that is not attached to this learner, type into the ‘Search all staff’ box and then click “Add to FAO”. This will highlight the comment to these people on their dashboard(s).




Then fill in the main middle box with comment you wish to make. Please click the spell checker.

**Link to Meeting**
A comment can be linked with an existing meeting such as a One to One or a Progress Review, via the ‘link to meeting’ drop down.

**Link to Enrolment**
The comment can also be linked to a specific enrolment using the “Link to Enrolment” drop down.

**At Risk**
You can also suggest that the student may be at risk by ticking the ‘is at risk’ box. This does **not** change the student’s risk indicator, however the course team can see that there is an ‘at risk comment’ when *they* are updating the risk indicator.

You can enter a due date if a response/action is required. You can tick boxes in the bottom right, if you want the Comment to be visible in ProPortal, and/or if you want the student to be Emailed a copy of the Comment.

Once finished, click the “Save” button to save the comment.

**Adding the Same Comment to Multiple Students**

To add a comment for multiple students, select “Add Student Comment” from the **Student Group** page.

STUDENT GROUP

**Details**
Student Group Type
Add Student Comment
Add Student Diary Note
Add Student Meeting
SMART Targets Calendar
Add Enrichment Activity
Add Support

This brings up a list of students with tick boxes next to their names. Tick the student(s) you wish to make the Comment about (or click the top tick box to select all the students). Then press the “Next” button at the bottom of the page.

| ☐ | Learner Ref | Name | Date Of Birth |
|---|---|---|---|
| ☐ | 321050 | Sapple Adam | 11/02/1998 |
| ☐ | 306305 | Bilbo Baggins | 27/05/1996 |
| ☐ | 322913 | Bertha Bagnall | 30/12/1997 |

This will bring up the standard Comment box (see individual Comment section to see how to fill this in). Once complete, click “Save” to save the Comment. After clicking ‘Save’, the following message is displayed at the top of the Comment box.

**The data was saved successfully**
**You may enter another comment for the same student(s).**
**To reselect student(s) press the Back button.**

# Promonitor User guide #6: **Meetings**

## Done by: **Personal Tutor**

## When: **Prior to One to Ones / Progress Reviews**

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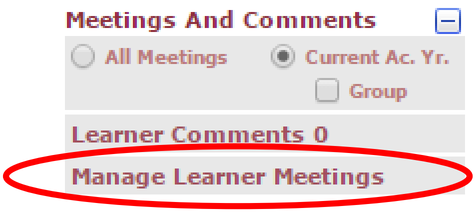
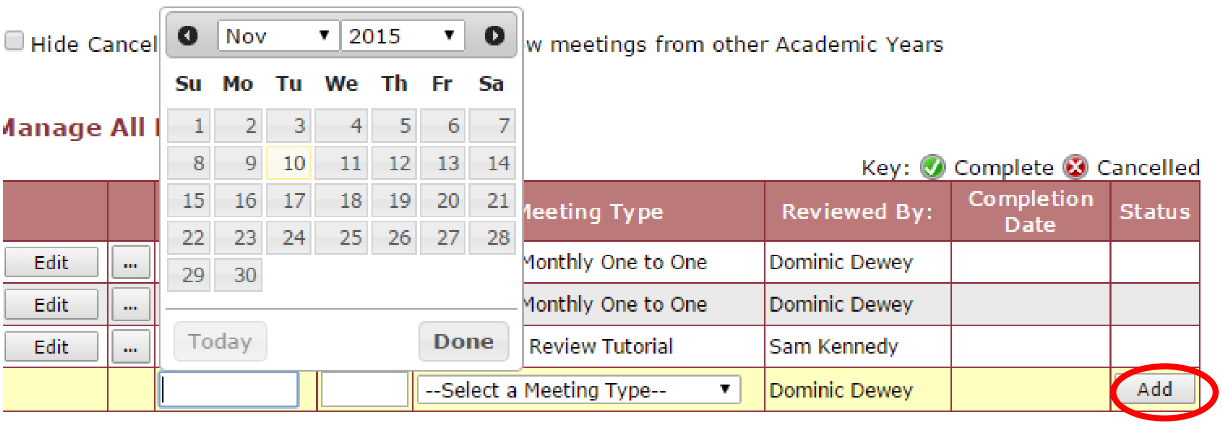
Before you can fill in a One to One or Progress Review, you have to set up a meeting. This can be done either in advance or on the day.

**Setting up a meeting for an individual student**
To set up a meeting for an individual student, go into that student's ILP page. You then need to select 'Manage Learner Meetings' under the subheading 'Meetings and Comments'. Selecting this will take you to the Manage Meetings page.




On the Manage Meetings page, enter a date into the Meeting Date box…




Type in a time (optional), then select the type of meeting from the drop down menu. The meeting types that can be chosen are Monthly One to One, Additional One to One, Progress Review Tutorial, Induction One to One and Progression One to One.

After selecting a meeting type, simply click on 'Add' to confirm the meeting.

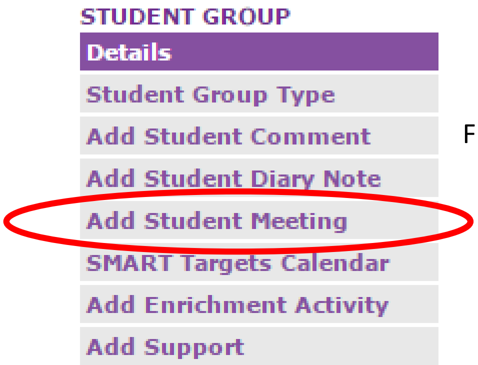
| | | Meeting Date: | Time: | Meeting Type | Reviewed By: | Completion Date | Status |
|---|---|---|---|---|---|---|---|
| Edit | ... | Nov 17 2015 | | 2. Additional One to One | Dominic Dewey | | |
| Edit | ... | Nov 11 2015 | 14:00 | 1. Regular Monthly One to One | Dominic Dewey | | |
| Edit | ... | Oct 14 2015 | 13:00 | 1. Regular Monthly One to One | Dominic Dewey | | |
| Edit | ... | Oct 14 2015 | | 3. Progress Review Tutorial | Sam Kennedy | | |

The meeting will then be saved to the list. When it comes to writing up the meeting, you can click on the '…' button to access it. You can also edit the date/time by clicking the 'edit' button.

**Adding meetings for multiple students on the same day**

*Only use this method if you know what you're doing. Contact [elearning@hrc.ac.uk](mailto:elearning@hrc.ac.uk) if you need help.*

First, go to the 'student group' page.




From this page, click on 'Add student meeting'.

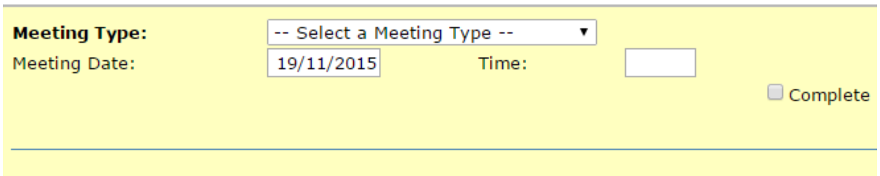
On the following page, tick the box next to each student you want to create a meeting for.

| ☐ | Learner Ref | Name | Date Of Birth | Gender |
|---|---|---|---|---|
| ☐ | 321050 | Sapple Adam | 11/02/1998 | M |
| ☐ | 306305 | Bilbo Baggins | 27/05/1996 | M |
| ☑ | 322913 | Bertha Bagnall | 30/12/1997 | M |
| ☐ | 322823 | Brush Basil | 21/01/1998 | M |
| ☑ | 321216 | Conner Benson | 26/11/1997 | M |

Then scroll down to the bottom of the table and click on Next>>

You then need to set up the meeting. Pick a meeting type from the drop-down menu.
The page will then change based on your selected meeting type.

Click on the 'Meeting Date' box to select a date. You can leave the time blank for now, as of course you can't have a meeting with multiple students at the same time.




After selecting your date / meeting type, scroll down and ignore the 'Brief Meeting Notes' boxes.

Click on the Add button at the bottom. Your meetings have now been created and can be accessed from the individual student's meeting page(s).

# Promonitor User guide #6.1: **One to One Tutorials**

## Done by: **Personal Tutor (in meeting with learner)**

## When: **Monthly (or ad-hoc)**

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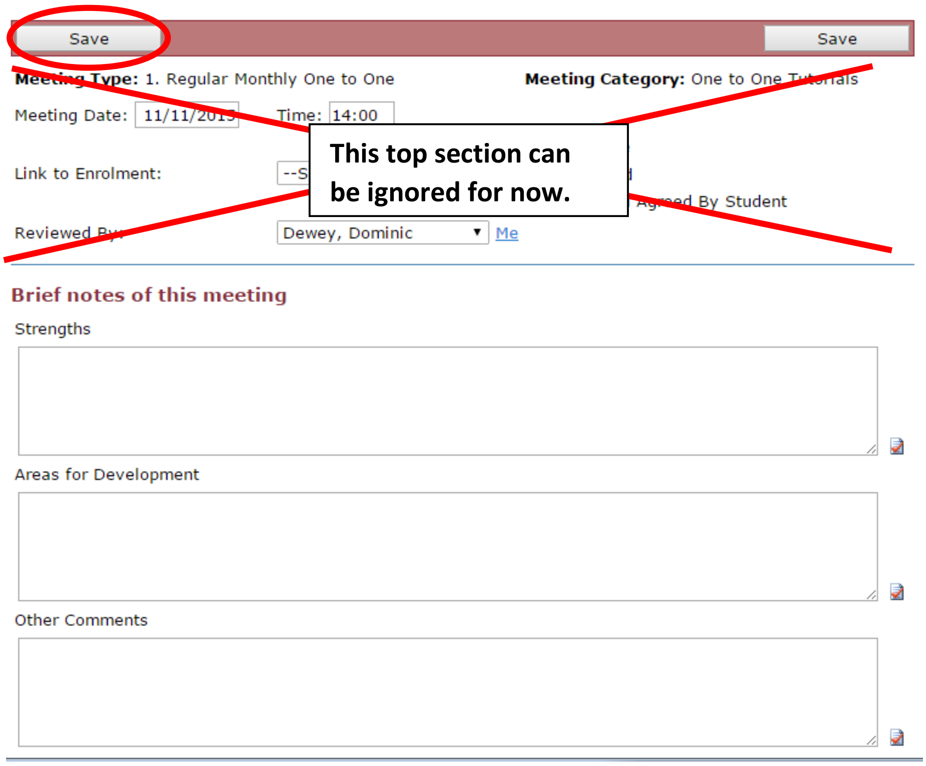
**<u>To set up a One to One meeting please see ProMonitor Guide - Meetings</u>**

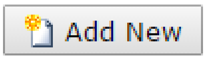
To access a One to One meeting, go to the student's ILP page and select Manage Learner Meetings or select the specific One to One from the One to One Tutorials subheading. If you select manage learner meetings then click on the gray square with 3 dots in it to access that meeting.

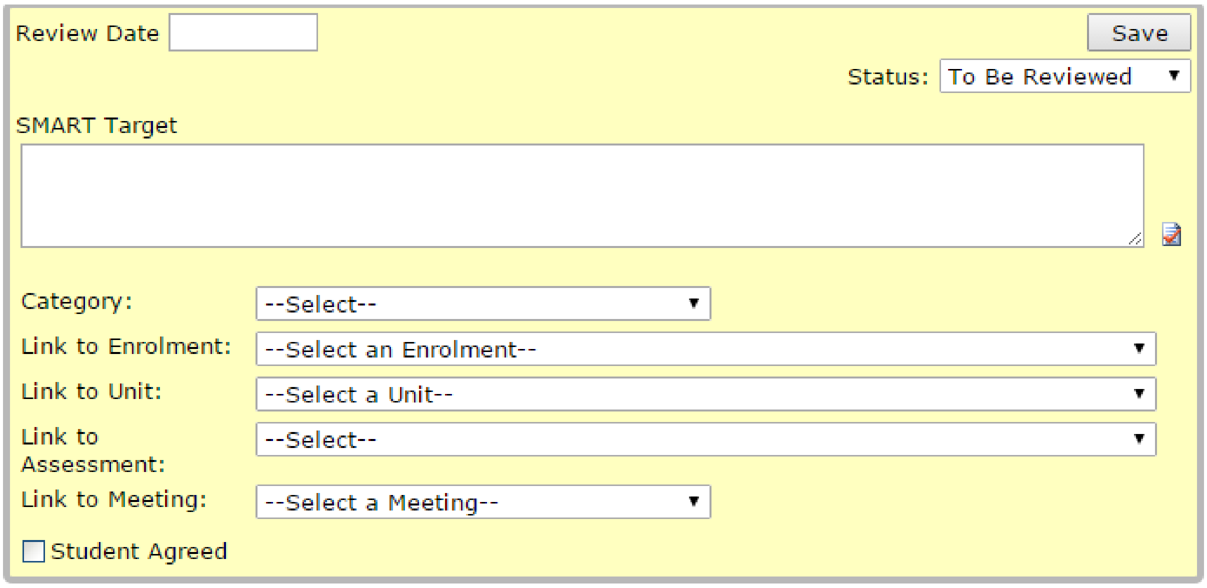

This will bring up the One to One meetings page.
Fill in the fields below 'Brief Notes for this meeting'. When finished, click the "Save" button at the top or bottom of the page.



**Adding a SMART Target**

To add a SMART Target, click on the “Add New” button under the SMART Target heading. This will bring up a popup to be filled in for the SMART Target.



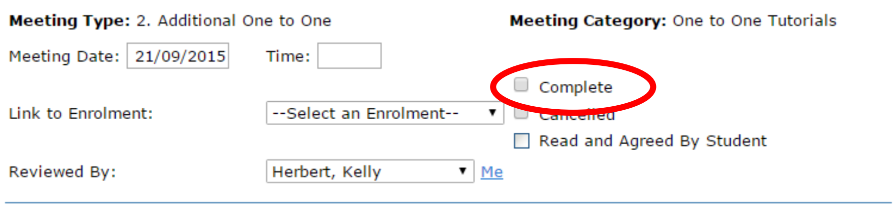




**Review Date:** Enter when the SMART Target will be reviewed.
**Status:** Set the current status for the target, e.g. to be reviewed, reviewed, achieved etc.
**SMART Target box:** Type the actual SMART Target here.
**Category:** What category does the target belong to? Academic/Vocational, English or Maths?
**Link to enrolment:** If it is related, you can link to an element of the learner’s POS, e.g. their main course, independent study etc.
**~~Lint to unit:~~** Ignore this for now
**~~Link to assessment:~~** Ignore this for now
**Link to Meeting:** If you wish to, you can select a meeting to attach the target to, such as a progress review (if the meeting is already set up in ProMonitor).
**~~Students Agreed:~~** Ignore this for now

**You are then able to add an *optional* comment with the 'Add' button. This is useful if you want to make a comment that is 'For the attention of' another staff member, meaning it will appear on their dashboard. For more info, please see the *ProMonitor Guide #5 - Comments.***


**Make sure that the meeting is completed when the One to One is finished.** This is done by clicking the tick box next to ‘Complete’ at the top of the page. This will turn the meeting green on your Dashboard.

**After the One to One, make sure to update the student’s Overall RAG (*see ProMonitor Guide #2 - RAG*)**



## Pro Monitor User Guide #6.2: **Progress Review Meetings**

## Completed by: **Personal Tutors (at meeting with learner)**

## When: **During November and February Review Weeks**

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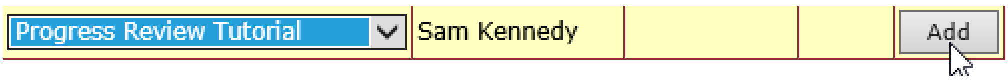
To complete a Progress Review, you must first **schedule a 'progress review tutorial' meeting** in Pro Monitor. This is covered briefly below; for full guidance on meetings please see *Pro Monitor User Guide #6 – Meetings.*

Creating the meeting collates all the relevant Subject Reports, SMART Targets and attendance overview data into one 'meeting' page, along with a personal tutor comments field for you to fill in.

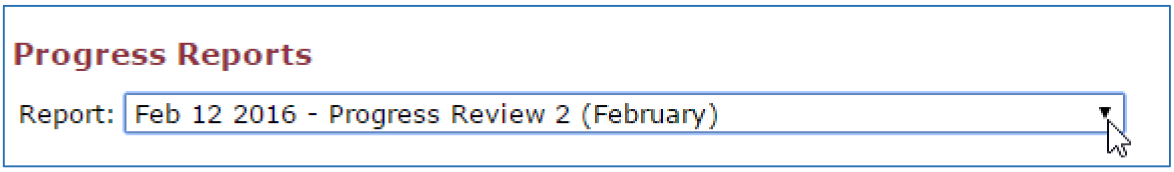
NB. Please see the final page of this guide for details of other areas of the ILP you should look at during the review meeting!

- *If you haven't already set up the meeting, do so like this*: On an individual student's page, Click Manage Learner Meetings > Select the 'progress review tutorial' meeting type > put in the date and click 'add'.




- Once the meeting is set up, click the ellipsis button '…' to access the Progress review

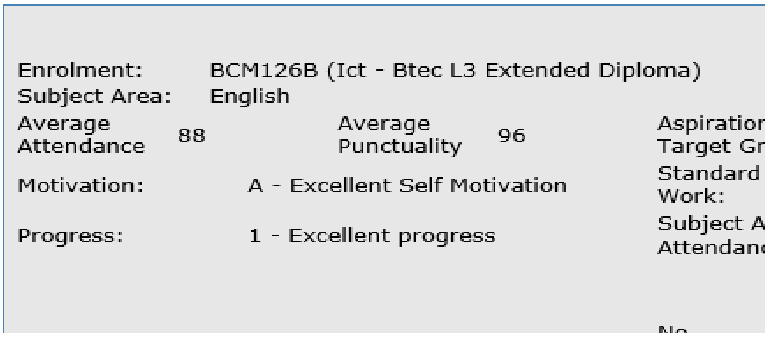

- Under Progress Reports, choose the correct review (February)….




**IMPORTANT: The grey box directly underneath 'Progress Reports' should not be completed at this stage; please follow the guidance at the bottom of page 3 below.**

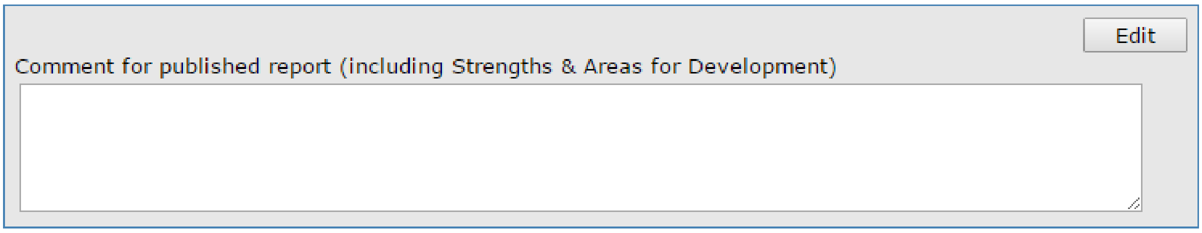
- Under *'Subject Reports included'* you'll see all the *Subject Reports* written for you to look at in this review, one after the other.

**Subject Reports included**


Enrolment: BCM126B (Ict - Btec L3 Extended Diploma)
Subject Area: English
Average Attendance 88
Average Punctuality 96
Aspiratior Target Gr
Motivation: A - Excellent Self Motivation
Standard Work:
Progress: 1 - Excellent progress
Subject A Attendan

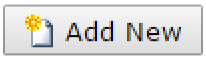
- Under ‘For completion by Personal Tutor’, click edit, type in your comment and click save.

**For completion by Personal Tutor**

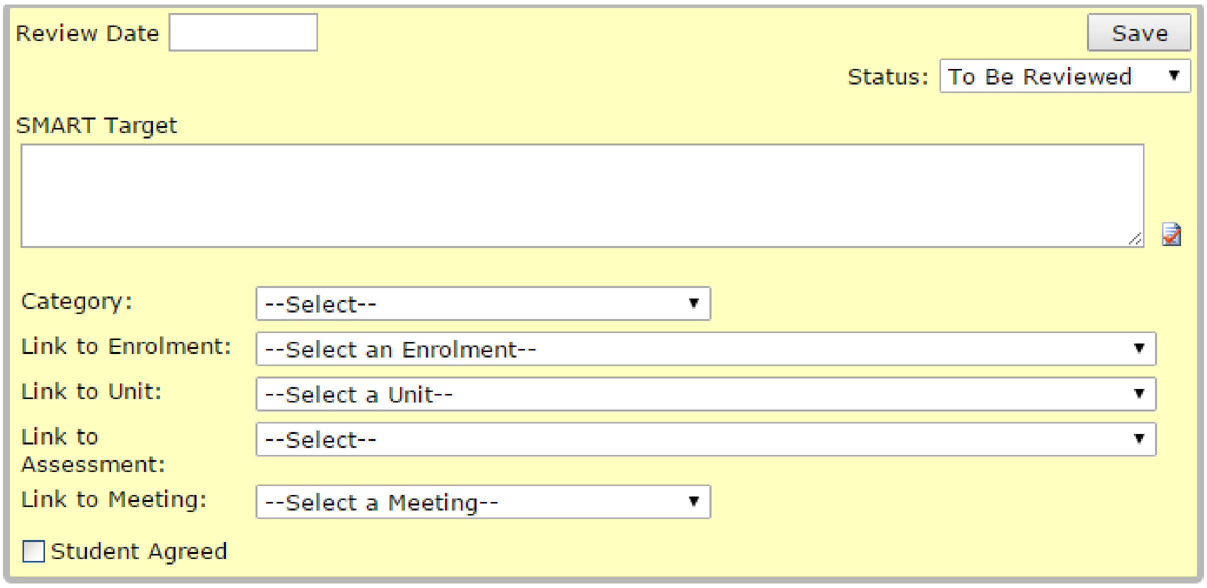

Edit
Comment for published report (including Strengths & Areas for Development)

- Update the SMART Targets listed (click ‘set achieved’ or click ‘edit’ to choose another status)

**Adding a SMART Target**




To add a SMART Target, click on the “Add New” button in the middle of the page. This will bring up a pop-up for you to fill in.


Review Date
Save
Status: To Be Reviewed
SMART Target
Category: --Select--
Link to Enrolment: --Select an Enrolment--
Link to Unit: --Select a Unit--
Link to Assessment: --Select--
Link to Meeting: --Select a Meeting--
Student Agreed

**Review Date:** Enter when the SMART Target will be reviewed.
**Status:** Set the current status for the target, e.g. to be reviewed, reviewed, achieved etc.
**SMART Target box:** Type the actual SMART Target here.
**Category:** What category does the target belong to? Vocational (Academic), English or Maths?

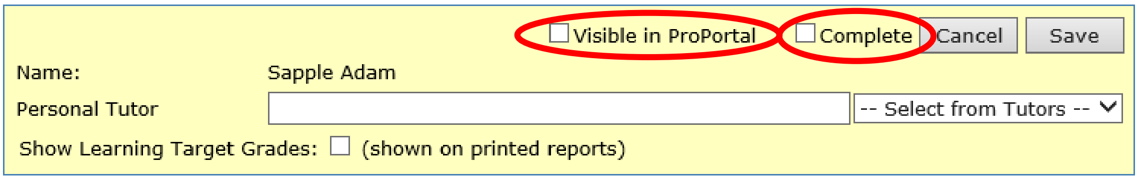
**Link to enrolment:** If it is related, you can link to an element of the learner's POS, e.g. their main course, independent study etc.
**Lint to unit:** Do not use (currently redundant)
**Link to assessment:** Do not use (currently redundant)
**Link to Meeting:** The target should already be linked to the Progress Review meeting so you do not need to change this.
**Student Agreed:** (currently redundant)

Once the SMART Target is filled in, click 'Save' in the top right corner of the pop-up. This will add the SMART Target to the SMART Target page.

- You are then able to add an **optional** Comment with the 'Add' button. This is useful if you want to make a Comment that is 'For the attention of' another staff member, meaning it will appear on their dashboard. For more info, please see the *Pro Monitor Guide #5 - Comments.*


- **Once you're happy that the content of the review is complete and no further editing is required, scroll back up to the grey section and click *edit*…**

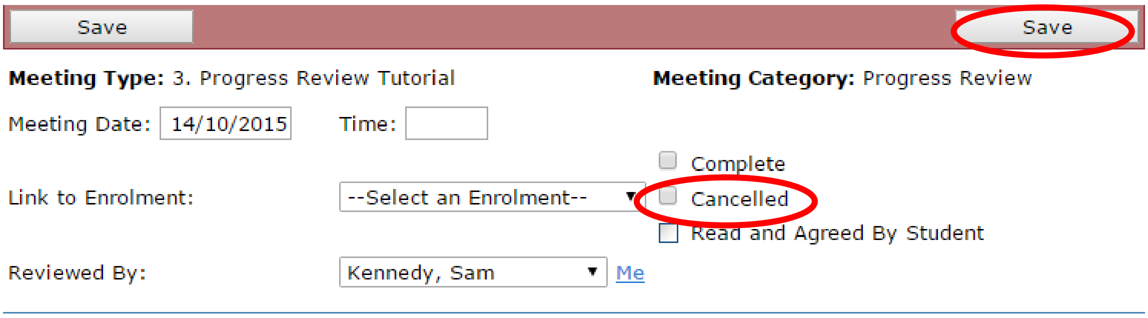

Tick the *complete* **and** *visible in Pro Portal boxes*, choose yourself from the 'select from tutors' dropdown menu and click save.




**IMPORTANT**

- If you don't tick 'complete', the progress review **will not** be processed for the printed reports.
- If you don't tick 'visible in Pro Portal', the student **will not** have access to their completed review.

Now the Progress Review is finished, make sure that the meeting is completed by ticking the complete tick box at the very top of the page and clicking 'Save'.




This will lock the meeting and show it green/complete on your dashboard.

**IMPORTANT: OTHER SECTIONS OF THE ILP TO LOOK AT DURING THE MEETING**

During the Progress Review meeting you should *also* visit the following sections of the learner's ILP in order to check or update information. To do this while filling in a Progress Review meeting form, right-click on the relevant link on the left and open it in a new tab.

- RAG & Risk Indicators
  **To set/ edit the Overall RAG rating for the learner**. The Risk Indicators for each element of their Study Programme also appear on this page and can help inform your choice. (See ProMonitor Guide #2 - RAG)

- Course Targets
  **To check that Target and Aspirational Grades have in fact been set** for the learner and add/adjust where necessary.

- Career Plans
  **To note down student's career goals** in the 'what are your career goals?' box. (They will be able to do this themselves in future via ProPortal)
  **Make a selection** in the 'Choose the option that best describes your goal' box.
  In the Progression tracking box, **note any advice** you have given them in order to help them on their journey and the review period that you did it (February this time round).