

QM Easy

QMS MADE EASY

TRAINING MANUAL

QM Easy on Mobile

Capture appraisals, lesson observations and classroom reviews on your phone — wherever you are, in one hand.

Works like an app — nothing to install

QM Easy · qmeasy.co.za

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1. Overview

1.1 What the mobile version is

QM Easy has a purpose-built mobile version that runs in your phone's browser and behaves like an app — big tap targets, one-thumb operation, and no horizontal scrolling.

- ✓ **Nothing to install** — no app store, no updates to manage
- ✓ **Same login** — the same email address and password you already use
- ✓ **Same data** — everything saves to the same place; capture on your phone, finish on your computer
- ✓ **Add it to your home screen** and it opens from an icon like any other app

1.2 What it is best at

The mobile version comes into its own when you are away from your desk:

Task	Why mobile suits it
Lesson observations	Score as you watch, from the back of the classroom.
Classroom reviews	Walk the room with the checklist in your hand.
Signing things off	Clear approvals in a free moment rather than at your desk.
Checking what is outstanding	Your attention list is the first thing you see.

1.3 What you still need a computer for

A few things are desktop-only — by design, because they are set-up tasks rather than everyday ones:

- ✓ Settings, user management and appraiser links
- ✓ Support Staff configuration — positions and appraisal templates
- ✓ Support staff capturing their own **self-assessment**
- ✓ Some PDF downloads and the full score-sheet views

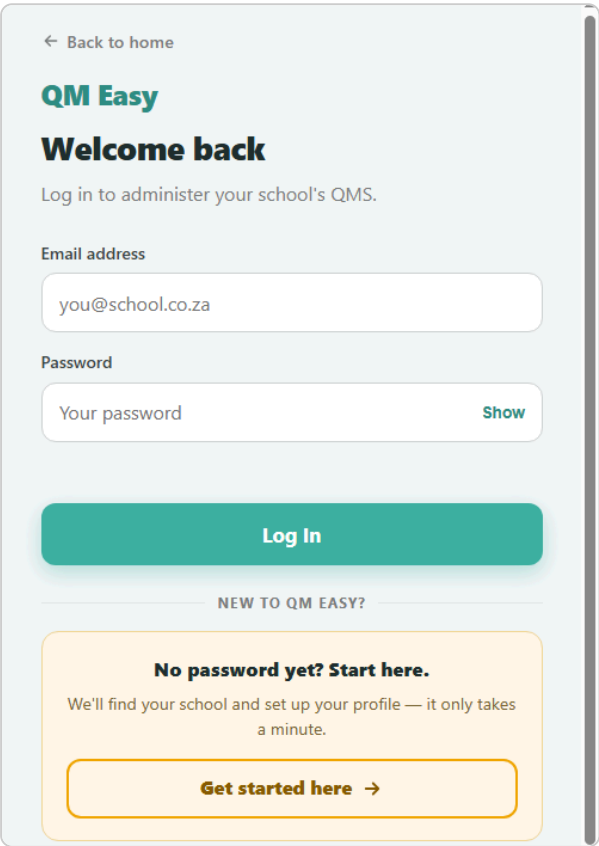
Tablets get the full desktop site rather than the mobile version — there is enough room on a tablet screen for the complete layout.

2. Getting started

2.1 Logging in on your phone

- 1 Open your phone's browser and go to the QM Easy website.
- 2 Tap **Log In**.
- 3 Enter your **email address** and **password**. Tap **Show** to check what you typed.
- 4 Tap **Log In**.

QM Easy recognises that you are on a phone and takes you to the mobile home screen automatically.



Logging in on a phone.

2.2 Switching between mobile and desktop

You are never locked into one or the other.

To do this	Tap this
Go from the desktop site to mobile	View in mobile mode , at the bottom of the dashboard
Go from mobile to the full site	Switch to the full desktop site , at the bottom of the mobile home screen

Your choice sticks for the session. If you switch to the desktop site on your phone, QM Easy keeps you there until you log out or tap **View in mobile mode** again. The preference resets next time you log in, so you will start on the mobile version again.

2.3 Adding it to your home screen

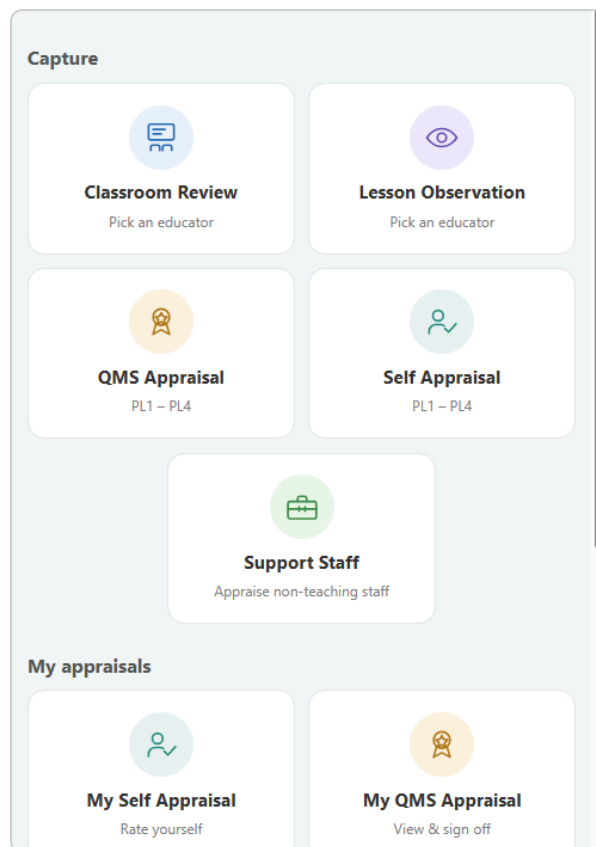
This is what makes it feel like a real app — a proper icon, and no address bar.

Phone	How
iPhone	Open QM Easy in Safari, tap the Share button, then Add to Home Screen .
Android	Open QM Easy in Chrome, tap the : menu, then Add to Home screen .

Do this once, on day one. Staff who add the icon use the system far more than those who have to find the website each time.

3. Finding your way around

3.1 The home screen



The mobile home screen.

The layout is always the same:

- 1 A **top bar** with your name, your post level and a log-out button.
- 2 Anything that **needs your attention**, at the very top.
- 3 Your **tiles**, grouped into sections.
- 4 A link at the bottom to switch to the full desktop site.

3.2 The attention list

This is the most useful thing on the screen — everything waiting on you, in one list, in priority order.

The heading tells you how many items there are, for example “*3 items need your attention*”. If nothing is outstanding, the list does not appear at all.

Label	What it means
Sign off	A classroom review or lesson observation about you is waiting for your signature.
To score	An appraisal is waiting for you to complete.
Rescore	An appraisal was declined and needs revisiting.
Approve	Someone has submitted something for your approval.
Moderate	A support staff appraisal is waiting for your Tier 2 sign-off.
Action needed	Support staff: your own appraisal is waiting for you to sign off.

Tap any row to go straight to that item.

This is how a PL1 educator reaches their reviews. PL1 educators have no picker screens — classroom reviews and lesson observations about them appear here when they need signing.

3.3 Your tiles

What you see depends on your role.

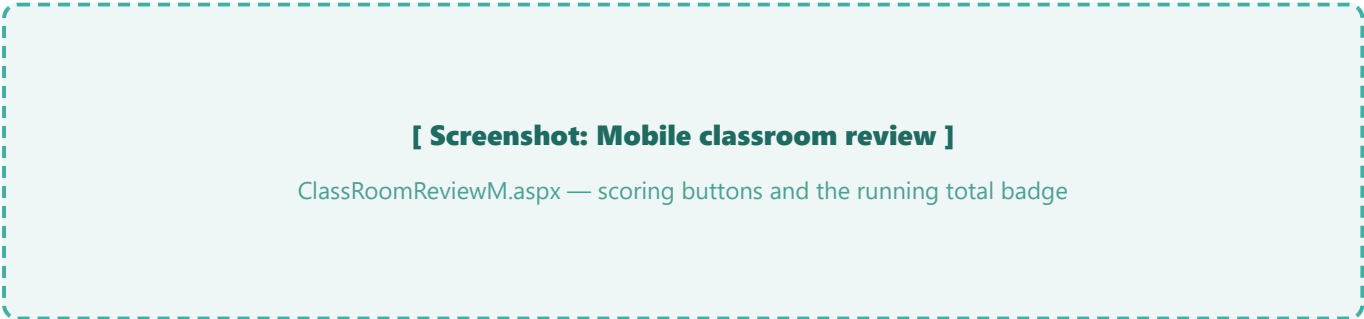
Section	Tiles	Who sees it
Capture	Classroom Review, Lesson Observation, QMS Appraisal, Self Appraisal, Support Staff	Appraisers — PL2 and above
My appraisals	My Self Appraisal, My QMS Appraisal	Educators PL1 to PL4
My appraisal	My Appraisal	Support staff
Me	Score Sheet and My Workplan (PL2 and above); My Records and My Profile (everyone)	Everyone

4. Capturing a Classroom Review

Scored out of **56**. The running total sits in the top bar so you always know where you are.

- 1 Tap **Classroom Review** under Capture.
- 2 Choose the **term** and **year**, then tap the educator’s name.
- 3 Work through the four sections, tapping a score for each item.
- 4 Tap **Save** at any point — you can come back later.
- 5 When the review is complete and discussed, tap **Submit**.

Section	Out of	Scale
1. Classroom Appearance	16	1 = Needs Attention · 2 = Average · 3 = Good · 4 = Excellent
2. Record Check	12	1 = Not Available · 2 = Needs Work · 3 = Up To Date
3. Book Check	28	1 = Needs Attention · 2 = Average · 3 = Good · 4 = Excellent
4. General Comment	–	Free text



Capturing a classroom review on a phone.

In the Book Check section, record the **learning area** you reviewed and which **learners’ books** you sampled — two top, two middle and two weak learners.

Submit locks it. You will be asked to confirm: “Submit this classroom review? You will not be able to edit it afterwards.” Use **Save** until you are certain.

5. Capturing a Lesson Observation

Scored out of **104** across 26 descriptors, covering performance standards 1, 2 and 3.

- 1 Tap **Lesson Observation** under Capture.
- 2 Choose the term and year, then tap the educator.
- 3 Record the **Subject** and **Topic**.
- 4 Score each descriptor as you observe.
- 5 Tap **Note** under any descriptor to capture evidence in the moment.
- 6 Complete the **Observer's overall comment** and the **Educator's comment** after your feedback discussion.
- 7 **Save** as you go; **Submit** when the discussion is done.

[Screenshot: Mobile lesson observation]

LessonObservationM.aspx — criterion cards with the collapsible Note boxes

Capturing a lesson observation.

Use the Note boxes as you watch. A short note written during the lesson is worth far more at the feedback discussion than one reconstructed from memory an hour later.

6. QMS and Self Appraisals

6.1 Appraising someone else

- 1 Tap **QMS Appraisal** (or **Self Appraisal**) under Capture.
- 2 Choose the term and year, then tap the person.
- 3 Open **Appraisal details** and **Brief job description** to check the background information.
- 4 Work through each performance standard, scoring every descriptor.
- 5 Add a **comment for each performance standard**.
- 6 **Save** as you go; **Submit** when finished.

6.2 Your own appraisals

Under **My appraisals**:

- ✓ **My Self Appraisal** — rate yourself (Terms 1 and 3)
- ✓ **My QMS Appraisal** — view and sign off the appraisal done about you (Term 2 and Annual)

Annual appraisals show Term 2 as a guide. During the Annual round each descriptor also shows the score given in Term 2, so movement across the year is visible while you score.

Terms follow the type. Self appraisals offer **Term 1** and **Term 3**. Official appraisals offer **Term 2** and **Annual**.

7. Support Staff appraisals

7.1 If you appraise support staff

- 1 Tap **Support Staff** under Capture.
- 2 Choose the term and year, then tap the staff member.
- 3 Score each criterion from 1 to 4 and add a comment per section.
- 4 Complete the **Assessment Discussion Outcome**.
- 5 Tap **Save**, then **Send for sign-off**.

For staff who do not log in, the button reads **Complete appraisal** instead, and the discussion outcome is required.

7.2 If you are support staff

Tap **My Appraisal** to review and sign off the appraisal your assessor has completed.

Self-assessments are desktop-only. You can sign off an appraisal on your phone, but capturing your own self-assessment must be done on the full site.

8. Signing off, approving and declining

8.1 Signing off

- 1 Open the document from your attention list.
- 2 Read the scores and comments.
- 3 Scroll to the **Sign-off** card.
- 4 Enter **your password** — this is your digital signature.
- 5 Tap **Agree & sign off**.

The card shows who has already signed and when. Tap **Withdraw** to remove a signature you added by mistake.

8.2 Approving or declining

- 1 Open the item.
- 2 Tap **Approve** to accept it, or **Decline** to return it.
- 3 If declining, type your reason in the box that appears and tap **Confirm decline**.

On mobile the decline reason appears inline rather than in a pop-up, which is easier on a small screen.

A reason is required. Declining without one is not possible — you will be prompted to enter it.

9. My Records, Score Sheet, Workplan and Profile

My Records

Every record about you, newest first — appraisals, self appraisals, classroom reviews and lesson observations, each with a status label. PDF links appear on appraisal records.

Score Sheet

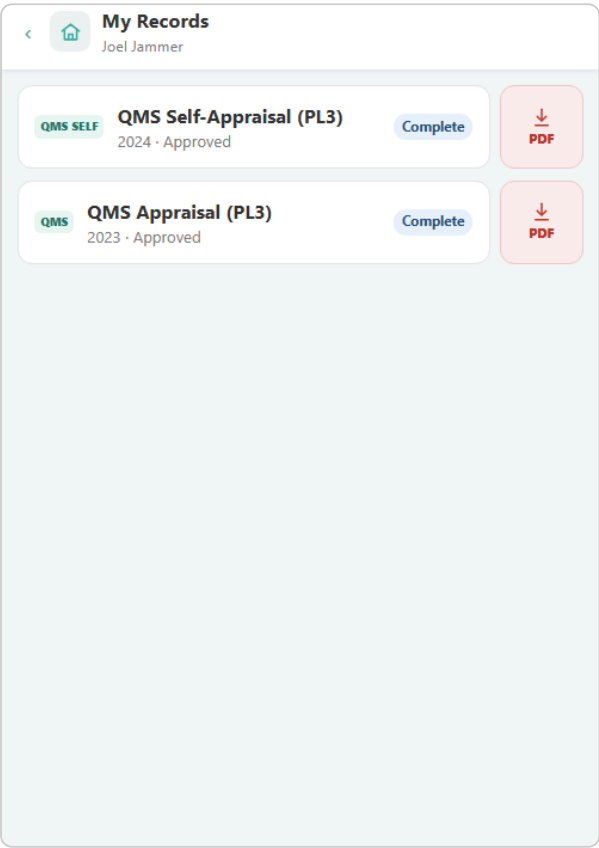
Your scores per performance standard, comparing **Term 2** and **Annual**, with your totals. Choose the year at the top. *Available to PL2 and above.*

My Workplan

Your workplan for the year, grouped by performance standard, with the agreement status shown at the top. *Available to PL2 and above.*

My Profile

Your account details, your teaching or job details, your brief job description, and a **Change password** section. Passwords must be at least five characters and must match.



My Records.

10. Tips for using it in a classroom

- ✓ **Open the observation before the lesson starts.** Have the educator and period selected so you are ready when the lesson begins.
- ✓ **Tap Save regularly.** School Wi-Fi is not always reliable; saving often costs nothing.
- ✓ **Use the Note boxes as you watch** rather than trying to recall detail afterwards.
- ✓ **Do not submit in the room.** Save, hold the feedback discussion, then submit once you and the educator have agreed.
- ✓ **Turn your phone sideways** for long comment boxes — the keyboard is easier to use.
- ✓ **Be discreet.** Hold the phone low and score between moments; the point is to observe the lesson, not the screen.

Finish on a computer if you prefer. Everything you capture on your phone is instantly available on the desktop site. Score in the classroom, write the longer comments at your desk.

11. Troubleshooting and FAQs

I logged in on my phone but got the full desktop site

Either you tapped **Switch to the full desktop site** earlier in this session, or you are on a tablet — tablets get the desktop layout by design. Scroll to the bottom and tap **View in mobile mode**.

I cannot find Settings on my phone

Settings, user management and Support Staff configuration are desktop-only. Use a computer, or tap **Switch to the full desktop site**.

The tile I need is not on my home screen

Tiles depend on your role. Capture tiles are for appraisers at PL2 and above; Score Sheet and Workplan are PL2 and above. If something you expect is missing, check your post level with your Principal or Super User.

My appraisal is locked

It has been submitted. Ask whoever it went to decline it back, which unlocks it for editing.

Do I need to install anything?

No. It runs in your browser. Adding it to your home screen just creates a shortcut icon.

Does it work without a signal?

No — an internet connection is required, because everything saves straight to the secure server. On a weak signal, tap **Save** more often.

Can I start on my phone and finish on a computer?

Yes. It is the same system and the same data — capture in the classroom, finish at your desk.

Is it safe to use on my personal phone?

Yes. Nothing is stored on the phone itself — it all lives on the secure server. Always log out on a shared device, and use your phone's screen lock.