



e-qual
paperless portfolio

Awarding Body Administrators guide

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Awarding Body administration overview	3
Users	4
Adding a user	4
Assigning roles to a user	4
Editing user details	5
Qualifications	7
Creating a qualification.....	7
Editing a qualification	9
Duplicating a qualification	9
Publishing a qualification	9
Delete a qualification	10
Centres.....	11
Create a centre	11
Select centres	11
Qualifications and External Verifiers	11

Awarding Body administration overview

To be able to carry out administration E-qual Paperless Portfolio effectively it is useful to understand the basics of how the software is structured.

You have access at the highest level. As an awarding body you are responsible for users under the roles of Administrator, Manager and External Verifier. You are also responsible for creating Awarding Body level qualifications that are 'handed down' to centres.

As an awarding body you can create a centre and assign your qualifications and associated external verifiers to that centre. Other awarding bodies within the system can also register that centre once it exists and assign their own qualifications.

Each centre contains users under the roles of Candidate, Assessor, Trainee Assessor, Internal Verifier, Expert Witness Advisor, Manager and Administrator. Centres can create their own centre based qualifications.

Each candidate in a centre is allocated one or more qualifications. Each qualification they are assigned to gives them a unique portfolio and a portfolio team to manage, assess and verify their work.

This guide will take you through each of the sections in your administration area. It is worth reading this document before you start to set up your users and portfolio settings. Some areas rely on other settings and information being entered before you can continue. This guide will help you to carry out the initial set up of your awarding body to enable you to use E-qual efficiently and effectively.

You will find it useful to refer back to this guide as you use the administration pages within E-qual Paperless Portfolio.

Users

The basic rule when creating users is that a user's personal details must be added first, then they can be assigned a role and a qualification where appropriate.

For example, once John Smith's personal details have been entered into E-quality he can then be assigned as an external verifier and then be given an NVQ in Management to verify.

You can also assign additional administrators and awarding body managers. Users can have multiple roles.

Adding a user

To add any type of user into E-quality, whether it is a manager, administrator or external verifier, requires the same process to be undertaken. You must first add the details of the user to the system. Only then can you assign a role, or any number of roles, to that user.

To add the user go to **Users > Add a new user**

Enter the new users details into the form. Any areas that have an asterisk (*) before the title of the information required are mandatory fields. These fields cannot be left blank.

All usernames should be unique within the system. You should create a password that you can give to the user. They can then change the password to be more personal to them when they login. It is vital that you include the correct email address for the user. This is the only way a user can find out their login details if they have forgotten them.

Once you have entered all the required details for the user, you can choose one of the options at the bottom of the screen. Clicking **Save** will save this user in the system and return you to the *Users* menu. Clicking **Quals and Roles** will take you to the screen to assign qualifications and roles to the user. Clicking **Add another** will save this users details and clear the form to allow you to add another users personal details. Clicking **Cancel** will return you to the *Users* menu without adding this user to the system.

Once a user has been entered into E-quality they can be assigned one or more of the predefined roles.

Assigning roles to a user

External Verifier

An external verifier can be added to portfolios as part of the portfolio team. They can then view any of the portfolios they have been assigned to and carry out their verification tasks.

To assign a user as an external verifier you must first enter the personal details for that user on the *Add a user* page or find an existing user on the *Edit a user* page. Once you have entered the user details or found the existing user, click **Quals and Roles**.

On the *Roles and Qualifications* page, place a tick in the **Active** tick box beside External verifier. You must then assign the user to a qualification. Click **Add a qual** at the bottom of the external verifier area. A pop-up will appear containing all the qualifications your awarding body can deliver.

Select the qualification you want the user to be an external verifier on and click **Save**. The qualification title should appear in the external verifier area and the **Active** tick box should be ticked.

This user has now been assigned to be an external verifier on this qualification. However, for the external verifier to be able to verify portfolios in centres they must be assigned to a centre in the *Centres > Quals and EVs* area.

A user can be an external verifier on any number of qualifications. Repeat the above process to assign more qualifications.

Awarding Body Manager

An awarding body manager has access to view all of the portfolios in any centre assigned to them, via a portfolio reporting page. This page shows them various details about users including the progress and frequency of access of all their candidates and assessors.

To assign a user as an awarding body manager you must first enter the personal details for that user on the *Add a user* page or find an existing user on the *Edit a user* page. Once you have entered the user details or found the existing user, click **Quals and Roles**.

On the *Roles and Qualifications* page place a tick in the **Active** tick box beside Awarding Body Manager. You can then choose the centres that this person can gain access to. Click **Add a centre** at the bottom of the area. A pop-up will appear containing all the centres assigned to your awarding body. Select the centres you want this manager to be able to see and click **Save**. The centre names should appear and the **Active** tick box should be ticked.

This manager can now access and report on all the portfolios using your awarding body qualifications in the centres selected. A user can be a manager for any number of centres. Repeat the above process to assign more centres.

Awarding Body Administrator

An awarding body administrator is responsible for setting up users and awarding body based qualifications, assigning roles, creating and managing centres and giving those centres the appropriate qualifications and external verifiers.

To assign a user as an administrator you must first enter the personal details for that user on the *Add a user* page or find an existing user on the *Edit a user* page. Once you have entered the user details or found the existing user, click **Quals and Roles**.

On the *Roles and Qualifications* page, tick the box at the bottom of the screen, next to **Awarding Body Administrator**.

Active and inactive users

E-qual does not allow deletion of users as this would affect auditing and reporting. Instead, you can make users inactive for the roles they are assigned to on the *Roles and Qualifications* page.

To do this, go to **Users > Edit a user** and find the user you wish to make inactive. Click **Quals and Roles**. Next to each role is an **Active** tick box. To make a user inactive for that role, remove the tick from the box. You can re-activate at any time by ticking the box. If you remove all ticks from all the boxes for that user, the user will become completely inactive and will no longer be able to login to E-qual.

Editing user details

You can change the personal details of a user by selecting **Users > Edit a user** from the menu. You can select the user you wish to edit by clicking the starting letter of the users last name from the alphabet at the top of the search area or by typing the users last name into the text box. As you type, any names that match will appear in a dropdown below the text box. This means you can select the user without typing in the full last name. Click **Search** to find any user(s) with that name.

The matching users will appear in a list below the search area. You can view the users details at this point by selecting a user from the list and clicking the **show user details** link.

To edit a user's personal details, select the user from the list and click **Edit details** to view an editable page of the personal details for that user. You can edit any of the details necessary in the relevant boxes. Click **Save** when you have finished.

Qualifications

Qualifications are created as hierarchical tree structures to give maximum flexibility. They could be a flat structure with only a single level of nodes or with as many levels of nodes as required to represent the structure of the qualification.

For example, a History qualification might have a number of nodes all at the same level, one for each of the subjects being studied. A node for The Battle of Hastings, a node for The Great Fire of London etc. A candidate simply adds their work at the appropriate node for each topic.

A more complex NVQ qualification structure could be represented by a first level of Units, leading to a second level of Elements within each Unit. Each Element could then have child nodes for Scope Statements, Knowledge Statements and Performance Criteria. In this scenario a candidate could add evidence at a higher node. For example, where a piece of work fulfils the whole unit, it could be attached at Unit level. Whereas if a document only satisfies a single Performance Statement, it might be attached lower down the tree structure.

Qualifications are created by awarding body administrators and 'handed down' to the centres. They can also be created at centre level by centre administrators. This means, for example, that a centre can allocate candidates onto both nationally recognised qualifications from an awarding body and also qualifications that have been created by the centre, company or organisation.

When you create a qualification you can edit any of the parts of the qualification until you decide to publish it. Publishing makes the qualification available for handing down to the centres assigned to you. This means that centres can then assign users to that qualification.

Once a qualification has been published it cannot be altered. For this reason, it is suggested that you create qualification titles with version numbers or publish dates added to the end. For example, **NVQ Welding (9/6/2007)** or **NVQ Welding (v2)**. This means that if you are required to alter the qualification, when you create the new version you can have a title with a new date or version number which will avoid the risk of confusion when assigning qualifications to users.

Creating a qualification

Creating a qualification is simply a case of working through the creation wizard entering relevant details.

1. Qualification name

On the first page you should enter the name for the qualification e.g. **NVQ Welding (v1)**.

Then enter a short code for the qualification. This is a code that is used in certain areas of E-equal, particularly reporting areas where the full name of the qualification will not fit comfortably on screen. The short code can be a maximum of 5 characters and should bear some resemblance to the proper title e.g. **WELD1**

A reference will be automatically added to the beginning of all your qualification titles to enable centres to distinguish between qualifications belonging to different awarding bodies. For example, if your awarding body is called **The International Qualification Centre** your short code might be **IQC**.

In the example above this would give a qualification title of **IQC: NVQ Welding (v1)** with a short code of **WELD1**

Once you have entered all this information you can move on to the next stage by clicking the **Next step >** button.

2. Qualification roles

The second stage allows you to customise the role names for this qualification. The default role names are already listed. You can choose to keep these or alter the names to be more appropriate for your awarding body. For example, you may have an alternative name for candidates in your organisation - they may be known as Learners. Simply replace Candidate with Learner in the **Name for candidate** text box. This change will only affect this qualification.

When you have made all the changes you require for this qualification click **Next step >**

3. Completion order

This page allows you to alter the order in which the four roles mark areas as completed. The page is populated with the default and most common order, that is assessor first, candidate second, internal verifier third and external verifier last.

If you want to change the order, simply select the roles from the dropdown menus. You can only select each role in one of the dropdowns, for example, you cannot choose Candidate twice. This order will only affect this qualification.

When you have made all the changes you require for this qualification click **Next >**

4. Qualification Structure

This is where you create the tree structure of your qualification. To begin, select the name of the qualification in the structure area. This will be the only node visible when you start.

Click **Add node**. This will bring up the *Node details* pop-up window where you can type or paste the text of your node. Each node also has a short code. This is used in a similar way to the qualification short code, as a reference when screen space will not allow the displaying of the full node text. It is prudent to make these codes understandable and relate to the text of the node.

Also on this pop-up window is a **Verification and Completion** tick box. This is used to show the level at which completion and internal verification of this qualification will take place. Any node which has this box ticked will appear in the *Completion* tree in each portfolio and will also appear in the internal verifiers *Verification panel*.

For example, if you have an NVQ which has a structure of Units which contain Elements and these Elements contain Performance Statements, Scope and Knowledge Statements. You are unlikely to require a portfolio team to mark as completed at every single statement or require internal verifiers to verify at statement level. It could be that they only perform these tasks at Unit level. In this situation, you would tick the **Verification and Completion** tick box on each of the Unit nodes only.

Likewise, if you wanted the team to verify and mark as completed at Element level, you would tick only all the Element nodes.

Once you have completed the information for this node, click **Save** and the node will be added to the tree. You can then continue to add more nodes as required. Any new nodes will always be added as a child of the one you have selected. So, if you require a flat structure without children, you should keep re-selecting the qualification title node for every new node you add.

You can edit a node by selecting the node and clicking the **Edit node** button. This will again bring up the *Node details* pop-up window. Edit any details and click **Save**.

You can delete a node by selecting the node and clicking the **Delete node** button.

Once you have completed your qualification structure, click **Next step >** to move on.

5. Mandatory Nodes

Mandatory nodes are ones which all candidates who are assigned to this qualification will receive automatically in their *Portfolio Evidence* area.

If you have a qualification structure where some nodes must be assigned to all candidates you can select them here. When a candidate is given the qualification, these nodes will be preselected in *Planning* and therefore visible on the candidates *Portfolio Evidence* page without needing to be selected by the assessor.

To select mandatory nodes, find the appropriate nodes in the tree structure and place a tick in the box next to each node that is to be mandatory. When you have selected all the mandatory nodes click **Finish**. This completes the creation of your qualification.

Editing a qualification

To edit a qualification, select the qualification title from the dropdown menu. Editing a qualification then follows the same steps 1- 5 as adding a new qualification, although you can click **Finish** at any stage of the procedure once you have made the changes you require.

Only unpublished qualifications can be edited here. Any qualifications that have been published will not appear in the dropdown menu and cannot be altered.

Duplicating a qualification

You can duplicate any qualification under your awarding body, both published and unpublished.

This facility is particularly useful if you need to make a new version of a qualification structure with only minor changes from the original.

To duplicate a qualification, select the title of the structure you wish to duplicate from the dropdown menu. The structure will appear for you to preview. Enter a title for the duplicate qualification e.g. **NVQ Welding (v2)** and click **Duplicate**. You will get a message informing you that a successful duplication has occurred.

You can now go to the *Edit Qualification* area and make any changes you require to the new duplicate structure. This will not affect the original structure.

Publishing a qualification

Publishing a qualification makes it available in E-qual to assign to centres and then for centre administrators to assign users to. Only published structures are available to be attempted by candidates and assigned to members of portfolio teams.

Once a qualification has been published it cannot be removed from E-qual. It is important you get your structure correctly set-up before you publish it, as once published, it cannot be edited.

To publish a qualification, select the title from the dropdown menu. The structure will be displayed. If you are happy with this qualification structure click **Publish**. You will get a message informing you that the qualification has been successfully published. This structure will now be available in E-qual.

Delete a qualification

Any unpublished qualification can be deleted. To delete a qualification, select the name from the dropdown menu. The structure will appear below. If you are sure that this is the qualification to be deleted, click the **Delete** button.

Published qualifications cannot be deleted.

Centres

As an awarding body you will be responsible for managing the work of several centres. These could be centres that you have introduced to E-qual or centres that another awarding body has added.

Once a centre has been created you can add it to your awarding body and assign it qualifications that it can use with candidates. External verifiers can also be allocated to centres as well as managers to look at particular centres and the work they produce.

Create a centre

Before creating a centre it is vital that you check if the centre already exists in the E-qual application. To do this go to Select centres and look for the centre name. See *Select centres* for details.

If the centre does not exist in E-qual you can create it by entering the centre details in the form. When you create a centre, you are required to enter details for an administrator. This will be the first user to access the centre administration area and set up details and users for that centre.

Enter the administrator's details, including a valid email address. Click the **Save details** button. This will add the centre to E-qual and will send out an email to the centre administrator. This email will provide details to allow the administrator to login for the first time. **It is vital that the email address is correct, without the email an administrator cannot gain access to their newly created centre.**

Select centres

This is where you can see all centres that you have assigned to your awarding body and add more centres to your organisation. You can add another centre that already exists within E-qual by clicking the **Add a centre** button. This will display a pop-up that contains a list of all existing centres in E-qual that are not already assigned to you. Select the centre you would like to add and click the **Add** button.

For example, if Alpha Centre approaches you and would like to put candidates on your qualifications, you can check if they already exist in E-qual and then add them to your list of assigned centres.

Qualifications and External Verifiers

To assign a qualification and external verifiers to a centre, find the centre by either typing the centre name in the search text box or clicking the appropriate letter. When you have found the centre, click on the name and click the **Edit** button.

You must first add a qualification to a centre. To do this click the **Add a qual** button. A pop-up will appear listing all the qualifications that are published in your awarding body. Select the qualification(s) you wish to assign to this centre by ticking the appropriate boxes, then click the **Ok** button.

Once a qualification has been assigned to the centre, you can then assign external verifiers to that qualification at that centre. Click the **Add an External Verifier** link. A list of external verifiers will appear in a pop-up. This list is populated by all external verifiers that have had this qualification added to their personal list of qualifications in the *Users > Edit user > Quals and Roles* area. See *Assigning roles to a user*.

Any selected external verifiers will appear in the centre administration area when they are allocating a portfolio team to their candidates.

You can deactivate an external verifier from a qualification or from the external verifier role by removing the tick from the appropriate **Active** tick box.