

e-qual
paperless portfolio

Candidate guide

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The candidate

The candidate is the person who owns the portfolio and the work that is added to it, the user who is being assessed. E-qual allows user role names to be altered, so you may be known as, for example, the learner, the pupil, the student or the apprentice. This does not alter the functionality of the candidate role as described below.

Each candidate has a portfolio for each qualification they are assigned to. These portfolios have a shared File Store - a collection of relevant documents that can be added as evidence to one or more portfolios.

Each portfolio also has a portfolio team. This can consist of any combination of assessor, trainee assessor, internal verifier, external verifier and expert witness advisor. Remember however, these roles could have different names in your portfolios. Each role name can be customised but their range of permissions and abilities in these roles remains the same.

Within each portfolio are various predefined areas suited to attaching relevant documents from your File Store. These documents can be attached by the candidate or the assessing roles and then commented on. The resulting portfolio of evidence can be accessed, reviewed and sampled at any time by the other members of the portfolio team.

The sections below describe each of the areas of the portfolio that can be accessed in the candidate role and how to use them. Online help is also available in the software itself by clicking **View help** button at the top right of each page.

Login

To login to E-qual Paperless Portfolio, enter your username and password into the relevant boxes and click on the **Login** button.

If you cannot remember your username or password, click on the **Forgotten Username or Password** link. This will take you to a page where you can enter the email address that you have in your E-qual account. Your login details will be emailed to this address.

If you require further help with your login to E-qual, contact your administrator.

Select role

It is possible, within your E-qual account, to work with more than one role. If you have 2 or more roles assigned to you, use this page to select which of your roles you wish to login as.

In this case we are logging in as the candidate role, so click the **Select** button next to Candidate.

If you wish to return to this screen to login using an alternative role, click on the **Change my role** link at the top right of any screen.

Select qualification

If you are undertaking more than one qualification, this screen allows you to choose the portfolio you wish to work with.

A list of your qualifications are displayed, click the relevant **Select** button to open the appropriate portfolio. You can return to this page to view an alternative portfolio at any time by clicking the **Exit this portfolio** link at the top right of any page.

Portfolio menu

The menu screen gives you access to all areas of the portfolio. The menu is split into 3 areas, Document Management, Portfolio and Extras. Each area has buttons that take you to the relevant pages. To visit a particular page of the portfolio click the appropriate menu button.

At the bottom of the menu screen are your personal details that are stored in E-qual. These can be changed by clicking the **Edit** button. Alongside your personal details are the details of your Portfolio Team. These are the people who will work with you and are able to view your portfolio.

To the right of the menu buttons is the Portfolio Progress figure. This is the amount of your portfolio that has been locked by the assessor and is considered 'finished'.

Below this is the Discussions area. See **Discussions** for help with using this feature.

If you have more than one portfolio and you wish to exit this one to view another, click **Exit this portfolio** in the top menu bar or the menu area.

If you have more than one role in the system you can click **Change my role** to allow you to choose another role.

Clicking **Change my details** will take you to a page that allows you to alter your personal details including your password.

Clicking the **Logout** button at any time will take you out of the E-qual system and back to the Login page.

Discussions

The Portfolio menu contains a Discussions area. This is where you can converse with some of the people involved in this portfolio or in some cases, read discussions between other users of the portfolio. The Discussions area is also accessible from each page of the portfolio using the Discussions button in the Tools panel.

At the top of the discussions area is the name of the person you are having a discussion with. If you have the option of talking to more than one person this area will feature a dropdown menu containing all the discussions you can contribute to or read. Click on the menu and select the person that you wish to leave a message for.

To add a text entry to the active discussion, type your entry into the text area at the bottom and click the **Submit** button. The message will be added at the top of the active discussion together with details of the date and time the entry was added.

NOTE: Care should be taken when using the Discussions area as you are not able to remove entries once they have been added.

When you login to your portfolio any new discussions that have been added for your attention since your last login will be marked by a red star. This star will disappear once you have accessed that new entry.

File Store

The File Store is where you upload, organise and manage the documents to be used in your portfolio(s). The File Store is shared and available in all of that users portfolios. The File Store is only available to you and the assessor roles.

The File Store contains a structured list of folders and files displayed by file name. Also displayed is the evidence type for that file where appropriate, the person who uploaded the file, the date it was added and an icon to show whether that file is used in a portfolio. The files can be organised into folders, as required.

At the bottom of the File Store are two rows of buttons that give you access to the various functions. The top row allows you access to functions that you can apply to an existing file or folder. The lower row contains buttons that allow you to add new items to the File Store. These are explained below:

Open file: To open an item, click on a file and then click the **Open** button. Documents will open in their native application, Links will open in a new browser window, Text files will open in an E-equal text window.

NOTE: You must have the appropriate application installed on your PC to open the documents (e.g. file1.doc requires Microsoft Word to open it).

Rename: To rename an item, click on a folder or file and then click the **Rename** button, a pop-up window will appear. Enter the new name of the file or folder into the text box and click the **Ok** button.

Delete: To delete an item from the File Store, click on a file or folder and then click the **Delete** button. You will be prompted if you are sure that you want to delete the selected item. If you click **Ok** the file or folder will be deleted. If a file has been attached to a part of a portfolio, the file cannot be deleted. You must 'unattach' it from any part of every portfolio it has been attached to before you can delete the file.

Evidence Type: To assign or change the Evidence Type for a file, click on a file and then click the **Evidence Type** button. A pop-up window will appear with a drop-down menu containing all the Evidence Type options available. Select an option from the menu for the selected file and then click the **Ok** button. The Evidence Type for the file will be shown to the right of the file name, in the Evidence Type column.

Move file: To move a file from one folder to another, click on the file you want to move and click the **Move file** button. A pop-up window will appear with a tree structure of the folders in your File Store. Select the folder you want to move the file to and click **Ok**.

Upload file(s): To add new files from your PC to the File Store, select a folder to add the files to and click the **Upload File(s)** button. A pop-up window will appear. This window allows you to add a single file or multiple files to the selected folder in the File Store. Click **Select files** and the Windows dialogue box will appear. Find the file on your hard drive, CD-ROM, floppy disc, network drive or any other storage device attached to your PC. Select the files and click **Open** to add the file to the upload files window. The file will be added to the File Store. If you want to add more than one file simultaneously to the selected folder, as you select files hold down the Ctrl or Shift button on your keyboard.

Once you have added all the files you require, click **Close**.

NOTE: This may take some time if you are uploading several large files together.

Add folder: To create a new folder, click the **Add folder** button. A pop-up window will appear. Type the name for the new folder into the text box and click **Save**. This new folder will be added to the File Store.

Add text file: To add a text file to your File Store, select the destination folder for the text file and click the **Add text file** button. A pop-up window will appear. In the 'Name of text document' field type in a name for the text file (this is the name you will see in the File Store). Type or paste your text into the Text field. When you are finished, click the **Save** button. The text file will be added to the selected folder with the file name you entered and the suffix .txt.

Add web link: To add a link to another location on the Internet, select the destination folder and click the **Add web link** button. A pop-up window will appear. In the 'Name of link' field type in a name for this link (this is the name you will see in the File Store). Type or paste the required Internet link into the 'Link to web page' field then click the **Save** button. The link will be added to the selected folder with the name you entered. You can check that the link is correct by clicking the **Click here to test link** text. This will open the URL you have entered in a new browser window.

Planning

This area is used by the assessor role to select the parts of a qualification to be undertaken by the candidate and as a place to store assessment planning documentation. The page contains an area to add planning documents to the left and the standard for the qualification as a tree structure to the right.

To add a document to the **Attached planning documents** area, the necessary file(s) must have already been uploaded to the File Store. Click the Attach file button at the bottom of the attach area. The File Store will open in a pop-up. Browse through the File Store to find the file(s) you want to add as planning documents. Place a tick in the tick box next to each document you want to add. Click the **Attach file** button located at the bottom of the File Store. The file(s) will be attached and will now be considered as part of the submitted portfolio.

A file can be viewed by selecting the filename in the **Attached planning documents** area and clicking the **Open file** button.

If you change your mind about a document and decide that you do not wish to submit it into the portfolio, select the file and click the **Remove file** button. The file will be removed.

NOTE: This file is only removed from the Planning Documents area, it is not deleted completely and will remain in the File Store for future use.

Assessors can lock documents, to prevent them from being removed, if they consider them to be suitable for inclusion in the final portfolio. This is indicated by the status of the padlock icon to the right of each filename. You will not be able to remove any locked documents.

HINT: Everyone has their own method of developing and recording assessment plans. Here is one example of how this might work. The assessor and candidate have initial discussions and the assessor draws up a plan in Microsoft Word. This plan is then uploaded by the assessor to the File Store and attached in the Planning area. This will now be considered as part of the submitted portfolio and be available for all people with access to this portfolio to view.

The candidate can login and open the assessment plan document, save it to their computer (maybe as Plan v2) and make any additional comments. They then upload the new version and place the into the Planning area. This procedure can be repeated as necessary. Using this system there can be a good audit trail of the planning process.

The qualification you are attempting is represented as a tree structure. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes. Clicking on node text selects that statement, indicated by a highlight around the statement. Each node also contains an area for a start date, a proposed completion date and an actual completion date.

Start Date is a date entered by the assessor to indicate when work on the particular statement will start.

Proposed Completion Date is a date entered by the assessor to indicate when work on the particular statement is planned to end.

Actual Completion Date is a date entered by the assessor to indicate when work on the particular statement has been completed.

The selected tick box (**SEL**) displays which statements have been chosen for you by the assessor role to attempt. Although other portfolio users can see the status of the selected boxes, only the assessor role can change them. Any statements shown as selected here will be visible and available to attach evidence to on the Portfolio Evidence page.

The Tools area at the bottom of the page gives you access to your discussions. Click the Discussions button to open them in a pop-up window. If you have new discussions the button will have a new star displayed. See **Discussions** for help with using this feature.

General Documents

This area is designed to contain general documents that are part of the portfolio but not necessarily documents that contribute to the main qualification structure. They could be documents that contain details about the candidate, items such as a CV or certificates, or general portfolio administration documents and induction documentation.

To add a document to the General Documents area, the necessary file(s) must have already been uploaded to the File Store. Click the Attach file button at the bottom of the attach area. The File Store will open in a pop-up. Browse through the File Store to find the file(s) you want to add. Place a tick in the tick box next to each document you want to add. Click the **Attach file** button located at the bottom of the File Store. The file(s) will be attached and will now be considered as part of the submitted portfolio.

A file can be viewed by selecting the filename in the **Attached general documents** area and clicking the **Open file** button.

If you change your mind about a document and decide that you do not wish to submit it into the portfolio, select the file and click the **Remove file** button. The file will be removed.

NOTE: This file is only removed from the General Documents area, it is not deleted completely and will remain in the File Store for future use.








Assessors can lock documents, to prevent them from being removed, if they consider them to be suitable for inclusion in the final portfolio. This is indicated by the status of the padlock icon to the right of each filename. You will not be able to remove any locked documents.

Portfolio Evidence

This page is the main area of the portfolio, used to attach evidence and comments to the appropriate parts of the qualification structure.

The standard for the qualification is shown on the left in a tree structure. The tree only contains the parts of the qualification that have been selected by the Assessor in the Planning area. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes.

Alongside each branch of the tree there may be several icons displayed. These are intended to provide information about the status of the node.

-  The small document icon indicates that there is evidence attached to that statement.
-  The small bubble icon indicates that a comment has been attached to that statement.
-  A star indicates that a new piece of evidence or new comment has been attached to that statement by an Assessor.
-  A down arrow indicates that new items have been added to a lower, child node.
-  A star with a down arrow indicates new items have been added at this level and at a lower, child node.
-  The padlock icon indicates whether an Assessor has locked a node. A node can be locked to prevent changes to the attached items if the documents and comments are satisfactory to complete that part of the qualification. When a node has been completed the padlock becomes a 'Completed' icon 

To the right of the tree is the **Documents attached to selected node** area and the **Comments attached to selected node** area. This is where documents and comments are added and displayed as part of the completed portfolio.

To attach evidence, select the appropriate node in the qualification structure, this will become highlighted. Click the Attach file button below the qualification structure. The File Store will open in a pop-up. Browse through the File Store to find the file(s) you want to add. Place a tick in the tick box next to each document you want to add to that node in the qualification structure. Click the **Attach file** button located at the bottom of the File Store. The file(s) will be attached and will now be considered as part of the submitted portfolio.

A file can be viewed by selecting the filename in the **Documents attached to selected node** area and clicking the **Open file** button.

If you change your mind about a document and decide that you do not wish to submit it into the portfolio, select the file and click the **Remove file** button. The file will be removed.

It is important to realise that a document only exists once in the portfolio, you are simply creating a link to that document when you attach it to a node. You can attach the same piece of evidence to many nodes in the qualification structure.

Likewise, removing the document from the Attached Documents area does not delete the file from the File Store, it just removes the link to that document.

To attach comments, select the relevant node in the qualification tree and click the **Add comment** button. A pop-up window will appear. Type your comment into the text box on the pop-up window and click **Save**. This comment will then appear in the **Comments attached to selected node** area. You can view and edit any comments you make, as long as they have not been locked, by clicking on the comment to highlight it and clicking on the **Open comment** button. You can only edit your own comments.

The Tools area at the bottom of the page contains buttons to enable you to access useful additional tools.

Click the Discussions button to open the Discussions area in a pop-up window. If you have new discussions the button will have a new star displayed. See **Discussions** for help with using this feature.

You can see a tabular view of the evidence and comments and where they have been attached by clicking the **Matrix** button. See **Matrix** for help with using this.

The Multi Attach tool allows you to attach multiple documents to many nodes of the qualification structure. Once you understand the concept of adding files to nodes you can use the Multi Attach tool to speed up the attaching process. See **Multi Attach** for help with using this.

Matrix

The matrix is a tabular representation of where documents and comments are attached to the qualification structure.

In the Documents section of the matrix the qualification structure is represented as a tree diagram showing two levels at a time - the nodes you are wanting to show documents for and their parent node. The matrix always opens at the top level of the qualification structure. That is, showing the short name of the qualification as the parent node and then the collection of child nodes below.

Along the left of the matrix is a list of all documents that are attached at that level of the qualification structure and any levels below. The matrix then shows, by a number of symbols, where each document has been attached.

- ✓ The tick indicates that the document has been attached at this node in the qualification structure.
- ↓ The arrow indicates that the document has been attached at a lower level - a child node of the current node - in the qualification structure
- ✓ ↓ The tick and arrow indicates that the document has been attached at this node of the qualification structure and has also been attached at a lower level - a child node of the current node - in the qualification structure.

Each document listed in the matrix can be opened in its native application by clicking on the document name.

The Comments section of the matrix indicates any comments that have been added at these nodes. Their position in the qualification structure is indicated by a small speech bubble icon in the column of the node they are attached to. Move your mouse over the comment to read the full text.

To navigate to up or down the levels of the qualification structure, simply click on the **Up** or **Down** buttons. Alternatively, you can use the 'You are here' links at the top of the matrix to move back up through the levels .

You can print the matrix for easy reference.

Multi Attach

The Multi Attach tool is designed to allow you to attach multiple documents to many nodes quickly. It contains a representation of the contents of your File Store down the left side of the window. You can open and close folders using the plus (+) and minus (-) icons, just as with the File Store. You can view a document by clicking on the filename.

Across from the document filenames is a collection of columns. Each of these columns represents a node in the tree. You can move down the tree to child nodes of the qualification by clicking on the **Down** buttons at the top of each column and back up through the tree levels by clicking the **Up** buttons.

For example, if the top of the columns read:

Unit1 Unit2 Unit3 Unit4

If you click the **Unit1** down button, you will move down the tree and the columns will be replaced by all the nodes that are under **Unit1**, that is the child nodes of the **Unit1** node.

Unit1 will now appear in the large box above the collection of columns, as the parent node. If you click the **Up** button above this you will be taken back up the tree, to where you began.

You can also use the 'You are here' breadcrumb navigation to move around the qualification structure.

Within each cell in the Multi Attach tool is a tick box. This indicates whether the document is attached at this node in the qualification structure. To attach a document to a node in the structure, simply tick the relevant box where the document name and node meet. To 'unattach', remove the tick.

You can attach as many documents to as many nodes, at any level, as required.

You cannot attach documents to any area an assessor has locked or marked as Completed. These parts of the qualification structure are indicated by a locked padlock or a Completed icon at the top of the column. All the attach tick boxes for that node will be disabled.

Once you have attached all the documents you require, click the **Ok** button. The qualification structure will refresh with all your documents and comments attached.

Completion

The Completion page is used for indicating which areas of the qualification have been completed. As portfolio owner, you may be required to agree that areas of the qualification are finished.

The nodes of the qualification structure that require marking as Completed are displayed in a tree structure. When you are able to make your completion decision on a node, the tick box under your role name will become active.

If you are happy with the work on this node and it is your turn in the completion sequence, tick the box. A date will be displayed next to your tick box. The tree works hierarchically, that is, if you tick a node with lower nodes, all of those lower, child nodes, will also be ticked.

You can change your mind and remove the tick as long as the next person in the completion sequence has not ticked their box.

Once a node has been marked as Completed by the first person in the sequence, that node is locked on the Portfolio Evidence page and the Completion icon is displayed against the nodes and attached documents. Documents and comments cannot be added, removed or edited on that node.

Once the whole qualification has been Completed, all documents in all areas of the portfolio are locked.

Forums

Forums are where you can share conversations, opinions, work and documents with other E-qual users.

The top page displays any groups of forums that you have been assigned to by forum administrators. You are free to read and contribute, where appropriate, to any of the forums displayed. If you do not have any forums assigned to you the Forums area will not be visible to you.

These forum groups contain topics. You can view the contents of the topics by clicking on the title.

Some forum owners will allow you to create your own topics in the forum. If this is the case, a **Create topic** button will be visible below the forum. Click the button and enter your topic title and description into the pop-up window to create your topic.

Topic

The topic page contains a list of all the discussions within the topic you have selected. It gives you details such as who started this discussion, when the last post was added and how many posts there are in total. You can read the posts within a discussion by clicking the discussion title.

You can return to the forums level by clicking the **My forums** link at the top left of the forums area or by clicking the **Go back** button.

Some forum administrators will allow you to add new discussions to this topic. To do this, click the **Add discussion** button. You can then enter the title of the discussion, the text that will be the first post in this discussion and, if you want to, attach a document. Click **Save** when you are finished. Your discussion will be created with your post as the first post.

Discussion

This is the post level of the forums. It is where new messages are added to create a conversation in this discussion area. You can read the posts that have been created, and in most cases, reply to an existing post or create a new post.

To reply to an existing post, click the **Reply** button below the relevant post, this will open a pop-up window. In this window you can edit the title of your post, enter your post text and attach a file if required. You will notice that because you choose to reply to an existing post, the text from the first post is added to the post in [quote] tags.

To post a new relevant post in this discussion, click the **Add post** button. This will open a pop-up that will allow you to add a title and the text of your post. You can also attach a document.

You can add some styling to your post by using the **Bold** and **Italic** buttons. Select the text you wish to style in the post window and click the **Bold** and/or **Italic** buttons. This will place the relevant tags in your text which will display with the correct styling when you submit your post.

You can use the navigation links on the left to move around the forums or click the **Go back** button to move up to the discussions level.

Resources

The resources area is where other roles can add documents, links and other content and learning to be shared among E-equal users.

Users can assign resources to you. Any resources you have been allocated will appear on this page. If you do not have any resources assigned to you the Resources area will not be visible to you.

To access an individual resource, click the **Open resource** button. This will open the resource in a new window.

Resources can be individual files, groups of files or learning materials or a link to another web site.