Centre Administrator guide

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E-qual Paperless Portfolio | Centre Administrator guide

Centre administration overview

For you to be able to administer E-qual Paperless Portfolio effectively it is useful to understand the basics of how the software is structured.

The highest level of access is Awarding Body level. These awarding bodies contain users under the roles of Administrator, Manager and External Verifier. They create Awarding Body level qualifications.

An awarding body creates a centre (an awarding body administrator created the centre you are about to administer) and assigns their 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, Administrator and Guest.

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 who will manage, assess and verify their work.

A centre administrator is responsible for adding and editing users, assigning roles, qualifications and portfolio teams, managing portfolio settings and administering forums and resources, where appropriate.

Centres can also create their own centre based qualifications.

This guide will take you through each of the areas. 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 centre 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 qualification. On each qualification they are assigned one or more of the predefined roles.

For example, once John Smith's personal details have been entered into E-qual he can then be assigned an NVQ in Management. On this NVQ he can be assigned as an assessor and an internal verifier.

Similarly, Jane Bloggs can be entered into the system and then be assigned an NVQ in Management and a refresher course in First Aid. She can be allocated as a candidate on each of these qualifications.

As John Smith has been added as an assessor on the Management course above, he can be added to Jane's portfolio team as her assessor for that qualification.

Adding a user

Important note: Before you can add users to your centre you must first create some companies in the Companies administration area. See page 15 for details.

To add any type of user into E-qual, whether it is a candidate, assessor or one of the management roles, requires the same process to be undertaken. You must first add the details of the user to the system and then 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 user's details into the form. Any areas that have an asterisk (∗) 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 suitable for 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-qual they can be assigned one or more of the predefined roles.

Assigning roles to a user

Candidate

A candidate is considered the portfolio owner. They are the user who is attempting the qualification to which they are assigned.

To assign a user as a candidate 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 *Edit user qualifications and roles* page, to assign the user to a qualification click **Add a qual** at the bottom of the screen. A pop-up will appear containing all the qualifications your centre can deliver. This list includes both centre created qualifications as well as any qualifications that have been allocated to your centre by an awarding body.

Select the qualification you want the user to be a candidate on and click **Save**. The qualification title should appear in the *Qualifications assigned* area. (If the user has previously been assigned this qualification and it appears in *Qualifications assigned* you can skip this step).

You can now assign this user as a candidate on this qualification. Click the **Assign user a role for this qualification** link below the qualification title. A popup will appear with a list of roles. Select **Candidate** and click **Save**.

Once you have also assigned assessors, internal verifiers and EWA's onto this qualification, you can assign the candidate a full portfolio team. See page 8 for details.

A user can be a candidate on any number of qualifications. Repeat the above process to assign more qualifications.

Assessor

An assessor is responsible for a number of candidates under one or more qualifications. An assessor has access to his personal management area. This presents data on all candidates assigned to him and also gives access to view and contribute to all portfolios.

To assign a user as an assessor 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 *Edit user qualifications and roles* page, to assign the user to a qualification click **Quals and roles** at the bottom of the screen. A pop-up will appear containing all the qualifications your centre can deliver. Select the qualification you want the user to be an assessor on and click **Save**. The qualification title should appear in the *Qualifications assigned* area. (If the user has previously been assigned this qualification and it appears in the currently assigned you can skip this step).

You can now assign this user as an assessor on this qualification. Click the **Assign user a role for this qualification** link below the qualification title. A pop-up will appear with a list of roles. Select **Assessor** and click **Save**.

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

Trainee assessor

A trainee assessor is responsible for a number of candidates under one or more qualifications. They have access to a personal management area that gives data on all candidates assigned to him and also gives access to view and contribute to all portfolios.

To assign a user as a trainee assessor 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 *Edit user qualifications and roles* page, to assign the user to a qualification click **Quals and roles** at the bottom of the screen. A pop-up will appear containing all the qualifications your centre can deliver. Select the qualification you want the user to be a trainee assessor on and click **Save**. The qualification title should appear in the *Qualifications assigned* area. (If the user has previously been assigned this qualification and it appears in *Qualifications assigned* you can skip this step).

You can now assign this user as a trainee assessor on this qualification. Click the **Add role** link below the qualification title. A pop-up will appear with a list of roles. Select **Trainee Assessor** and click **Save**.

A user can be a trainee assessor on any number of qualifications. Repeat the above process to assign more qualifications.

Internal Verifier

An internal verifier has access to view all of the portfolios that they have been assigned to. They also have a verification panel that they can use to answer verification questions and conduct sampling.

To assign a user as an internal 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 *Edit user qualifications and roles* page, to assign the user to a qualification click **Add a qual** at the bottom of the screen. A pop-up will appear containing all the qualifications your centre can deliver. Select the qualification you want the user to be an internal verifier on and click **Save**. The qualification title should appear in the *Qualifications assigned* area. (If the user has previously been assigned this qualification and it appears in *Qualifications assigned* you can skip this step).

You can now assign this user as an internal verifier on this qualification. Click the **Assign user a role for this qualification** link below the qualification title. A pop-up will appear with a list of roles. Select **Internal Verifier** and click **Save**.

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

Expert Witness Advisor

An expert witness advisor has access to the File Store of portfolios they are assigned to. This allows them to upload evidence documents for candidates to view and use in their portfolio.

To assign a user as an expert witness advisor 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 *Edit user qualifications and roles* page, to assign the user to a qualification click **Add a qual** at the bottom of the screen. A pop-up will appear containing all the qualifications your centre can deliver. Select the qualification you want the user to be an expert witness advisor on and click **Save**. The qualification title should appear in the *Qualifications assigned* area. (If the user has previously been assigned this qualification and it appears in *Qualifications assigned* you can skip this step).

You can now assign this user as an expert witness advisor on this qualification. Click the **Assign user a role for this qualification** link below the qualification title. A pop-up will appear with a list of roles. Select **Expert Witness Advisor** and click **Save**.

A user can be an expert witness advisor on any number of qualifications. Repeat the above process to assign more qualifications.

Centre Manager

A centre manager has access to view all of the portfolios within their centre 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 a centre 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 *Edit user qualifications and roles* page, tick the box at the bottom of the screen next to **Centre Manager**.

Centre Administrator

A centre administrator is responsible for setting up users and centre based qualifications, assigning roles and qualifications, managing portfolio settings and administering forums and resources, where appropriate.

To assign a user as a centre 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 click or found the existing user, click **Quals and roles**.

On the *Edit user qualifications and roles* page, tick the box at the bottom of the screen next to **Centre Administrator**.

Assigning a portfolio team

Once a user has been assigned onto a qualification as a candidate, they need to be given a portfolio team to enable the management of their portfolio to take place. This team can be any combination of assessors, trainee assessors, internal verifiers, expert witness advisors and where appropriate, external verifiers (note: external verifiers will only be available if the qualification has been created by an awarding body and they have set up external verifiers for your centre).

To assign a portfolio team, click the **Edit Portfolio Team...** link next to the candidate role name. A pop-up will appear with a list of all users assigned to that qualification under each role. To add an assessor to the portfolio team, place a tick in the box next to the appropriate assessors name.

Do the same for trainee assessors, internal verifiers, expert witness advisors and external verifiers as appropriate (note: external verifiers will only appear if the qualification has been created by an awarding body and they have set up external verifiers for your centre).

Once you have assigned all the relevant members of the portfolio team click **Save**. Once these people have been made members of the portfolio team they will always have an association with that portfolio, whether that is as an active or inactive member. This is for audit purposes.

If you wish to remove a member of the portfolio team from that portfolio you can deselect them on this page and choose another user. However any work they have done or discussions that have taken place will remain in the candidate’s portfolio. They will always have an inactive association to that portfolio.

This Portfolio Team pop-up also allows you to assign a candidate number for this qualification. At the top of the pop-up is a text area that allows you to type in any format of reference code, for example, a candidate reference number or an examination number. See page 9 for more details.

Active and inactive users

E-qual does not allow deletion of users that have used the system, as this would affect auditing and reporting, particularly for internal verifiers. Instead, you can make users inactive for the roles they are assigned to on the *Edit user qualifications and roles* 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 listed for each qualification is an **Active** tick box. To make a user inactive for that role against the qualification, 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.

To remove a user from the centre manager or centre administrator roles, simply remove the tick from the box against these role names.

Candidate number

A candidate can be given a relevant candidate or portfolio number for each qualification they are assigned to. To allocate this, go to **Users** > **Edit a user** and find the user you wish to add a number for. Click **Quals and roles**. Find the qualification and next to the candidate role name click **Edit Portfolio Team...** A pop-up will appear. At the top of this pop-up is a text field called 'Number'. Enter the candidate or portfolio number and click **Save**. This number will now appear as a reference in the candidates portfolio.

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 users 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.

This page is probably most used for changing passwords when users have forgotten them.

Delete a user

You can delete any user that does not have a qualification assigned, does not have a role assigned or has never logged into their portfolio or had an assessor look at their portfolio.

Select **Users** > **Delete a user** from the menu. You can select the user you wish to delete 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.

Once you have found the user you want to delete click the **Delete** link against that user. You will be asked to confirm that you want to delete that user. Click **Ok** and the user will be removed from E-qual.

View your users

This will give you a structured view of how your Internal Verifiers, Assessors and Candidates relate to each other in portfolio terms.

Select **Users > View your users** from the menu. You will see a tree structure of the users in your centre with all IVs visible. You can click on the IV's name to view details about that user. If you click the plus (+) icon next to the IV's name, the tree will open to show any assessors that are attached to the same portfolios as that IV. You can click on the assessors name to view details about that assessor.

If you open the tree a further level you will see all candidates that are under that IV and assessor. Clicking on the candidate's name will give you details about the candidate and any qualifications that they are working on under that assessor and IV. The qualification details will include the progress on that portfolio and the last access dates for the candidate and assessor.

Find specific users

This page helps you to search for users and view their details.

Select **Users > Find specific users** from the menu. You can then use the dropdown menus at the top of the page to find the user you are looking for. There are menus to filter users by role, qualification, user group, company and whether they are active or inactive.

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

You can print the list of users you find or export them as an Excel spreadsheet.

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 working on this qualification 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 can be created by awarding body administrators and 'handed down' to the centres and 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.

An awarding body qualification cannot be altered. However, for you to be able to verify it internally, you must assign a set of Verification Questions to it. You can do this using the Portfolio settings > *Verification settings > Assign question set* administration area. See page 17 for details.

Your candidates can be allocated any of the qualifications created and assigned to you by awarding bodies and any of those created and published by your centre.

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 in E-qual to assign users to.

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. Before you begin you should have at least one set of verification questions already set up in the *Portfolio settings > Verification settings*. See page 16 for 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-qual, 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**

Finally, on this page, enter a qualification type. This is a reference that will be added to the beginning of the qualification title. This will enable you to identify your qualifications from awarding body qualifications. This code can be a maximum of 5 characters. We suggest you enter a code that relates to your centre name or a code that identifies your centre qualification type. This could be for example, **Dip** for diploma or **Alpha** for Alpha Training Centre.

In the example above, this would give a qualification title of **Alpha: 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. Role names

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 centre. For example, you may have an alternative name for candidates in your centre - they may be known as Learners. Simply replace Candidate with Learner in the **Name for portfolio owner** 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 sign-off order

This page allows you to alter the order in which the portfolio team sign off parts of the qualification as Completed. The page is populated with the default and most common order, that is assessor first, candidate second and internal verifier third.

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, that is for example, you cannot choose Candidate twice. This Completion order will only affect this qualification.

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

4. Verification questions

This is the set of questions that the internal verifier will use to verify the portfolio in their reporting area. Questions must have been previously set up in the *Portfolio Settings > Verification settings* area. Select the question set you wish to use from the dropdown menu. Click **Next step** to continue.

5. 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 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 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 your portfolio team to mark as complete every single statement, or require your 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 **To be verified and authenticated** tick box on each of the Unit nodes only.

Likewise, if you wanted your team to verify and mark as complete 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 currently 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.

6. 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 will 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 steps 1 - 6 of adding a new qualification, although you can click **Finish** at any stage of the procedure once you have made the changes you require. See pages 11 - 13 for details.

Only unpublished centre qualifications or awarding body qualifications without verification questions assigned can be edited here. Any centre qualifications that have been published or awarding body qualifications with a set of verification questions assigned, will not appear in the dropdown menu and cannot be altered.

If you select an awarding body qualification from the dropdown menu and choose to edit it, you will be taken to the *Assign Verification Questions* page only. Once you have assigned the question set you cannot edit any other details of an awarding body qualification.

Duplicating a qualification

You can duplicate any qualification under your centre, 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 a 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 is the final step that makes it available in E-qual for 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.

You do not need to publish awarding body qualifications.

Deleting a qualification

It is possible to delete any unpublished centre qualification. To do this select the qualification title from the dropdown menu. The structure will appear in the area below. Click **Delete** to delete this qualification.

Portfolio Settings

This is the area where all other E-qual portfolio related settings are located. It is split into four areas, *General settings* - which contains the pages to enter document types and company details, *Assessor settings* - which contains settings for the assessor role, *Verification settings* - which controls settings for the verification role and *Edit centre details* - which is where the details about your centre are held.

General settings

This area contains various pages for entering details that are used throughout the portfolios in your centre.

Companies

All users are assigned to companies when they are added to E-qual. As a user's details are added in the *Add a new user* area they must select a company from the dropdown menu. This page allows you to set up the companies that will appear in that dropdown menu.

To add a company click **Add new...** A pop-up window will appear where you can add the company name and some brief details about the company, maybe the address, branch or site details. Click **Save** and the company will be added to the list.

To edit a companies details, click the **Edit** link next to the company. The details will become editable. Click **Update** when you are finished.

You can delete any unused companies. If a company is assigned to users it will have 'In use' beside it. If not, it will have a **Delete** link, click this to delete that company.

User groups

User groups are a useful way to categorise users, particularly candidates, so that for example, when an assessor views all his candidates he can split them into groups. Some examples of User groups include categorising candidates by start date, by job discipline, by work area or by school class.

To create a user group go to **Users** > **User groups**. Click **Add new...** and a pop-up will appear. Enter a name for the group and click **Save**. This group name will now be available to assign to users in the *Add a new user* and *Edit a user* areas.

You can edit these names at any time. Click the **Edit this group name** link next to the group name and the name will become editable. Change the name to the new name and click **Update**.

You can delete any unused group names from list. If a group name is assigned to users it will have 'In use' beside it. If not, it will have a **Delete** link, click this to delete that company.

Evidence types

Each document can be assigned an Evidence Type in the candidate's File Store. This page allows you to set up the evidence types that appear in that dropdown menu in the candidate's File Store.

To add a new evidence type click **Add new...** A pop-up window will appear where you can add the evidence type and a three character code to represent that evidence type. Click **Save** and it will be added to the list.

To edit an evidence type, click the **Edit** link next to the entry. The details will become editable. Click **Update** when you are finished.

You cannot delete evidence types once they have been included in the list.

Assessor settings

These are the settings that are associated with users in the assessment role.

Planner reasons

Each assessor has access to a planner for recording and organising their contact events with their candidates.

When an assessor adds an event to their planner they choose a reason for the event from a dropdown menu, for example observation, interview, meeting, etc. This page allows you to set up the planner reasons that appear in that dropdown menu.

To add a new reason click **Add new...** A pop-up window will appear where you can add the reason. Click **Save** and it will be added to the list.

To edit a reason click the **Edit** link next to the entry. The details will become editable. Click **Update** when you are finished.

To delete a reason click the **Delete** link. This will mean that the entry you have deleted will no longer be available in the dropdown menu.

Verification settings

These are the settings that are associated with users in the verification role.

Planner reasons

Each internal verifier has access to a planner for recording and organising their contact events with their assessors and candidates.

When an internal verifier adds an event to their planner they choose a reason for the event from a dropdown menu, for example observation, interview, meeting, etc. This page allows you to set up the planner reasons that appear in that dropdown menu.

To add a new reason click **Add new...** A pop-up window will appear where you can add the reason. Click **Save** and it will be added to the list.

To edit a reason click the **Edit** link next to the entry. The details will become editable. Click **Update** when you are finished.

To delete a reason click the **Delete** link. This will mean that the entry you have deleted will no longer be available in the dropdown menu.

Verification questions

These are the questions that internal verifiers answer when they use the verification panel to sample portfolios. You can create multiple sets of questions, which means you can have different question sets suitable for different qualifications and awards.

New question set

To create a new question set you need to follow the simple wizard.

1. Question set name

You need to give this set of questions a unique name. Type the name into the text box.

Click **Next step** when you are ready to continue.

2. Add sections and questions

Each new question set consists of questions split into sections. To create the questions you need to enter the name of your first section. Click the **Add section** button. A pop-up window will appear where you can enter the section name. Click **Save** to create the section.

You can now add questions to that section. Click the **Add question** button and a pop-up window will appear. Select the section you want to add the question to from the dropdown menu and enter the question text in the box below. Click **Save** to add the question and it will appear below the section title.

Continue the process to add all your required sections and questions for this question set.

Each question has an **Activated?** tick box. This allows you to deactivate any old or irrelevant questions or re-activate questions as necessary. Any unticked questions will not appear in the *Verification panel* for internal verifiers to answer.

Questions cannot be deleted, as old questions are required for audit purposes on older portfolios. Sections and questions can be edited, but only until they have been allocated to a qualification. Once allocation has taken place, questions can only be made active and inactive and new questions and sections can be added.

Edit question set

Once a question set has been created they can be edited at any time. You can add new sections and questions. To add a new section, click the **Add section** button. A pop-up window will appear where you can enter the section name. Click **Save** to create the section.

To add new questions, click the **Add question** button and a pop-up window will appear. Select the section you want to add the question to from the dropdown menu and enter the question text in the box below. Click **Save** to add the question and it will appear below the section title.

You cannot edit an individual question once the question set has been allocated to one or more qualifications. Any changes to a question text may make that question lose its context. To alter a question, enter a new question and deactivate the old one. This will mean any future portfolios will have the new questions only, any out of date questions will not be visible for the internal verifier to answer but will still appear in the internal verifiers reporting for previous sampling.

Assign to qualification

Once you are happy with the set of questions you have created, you can assign them to one or more qualifications. These can be awarding body or centre qualifications.

Select the qualification that you would like to assign questions to then click the **Edit** button. On the next page select the question set you wish to use from the dropdown menu. Click **Finish** to assign that question set to the qualification.

Once assigned, that question set cannot be changed, although the questions can be altered. See *Edit question set*, above.

Verification methods

These are displayed in the Verification panel for internal verifiers and are descriptions of the method used to answer each question. Some examples of verification methods are observation, portfolio, assessment, professional discussion etc. When an internal verifier answers a verification question they choose from a dropdown menu which method he used to come to his decision for each question.

To add a new verification method click the **Add new...** button and a pop-up window will appear. Enter the name of the new method and click the **Save** button.

To edit a method click the **Edit** link next to the relevant entry. The text will become editable. Click **Update** to submit the changed text.

Edit Centre Details

This page contains the details for your centre. To change the details, edit the text in the relevant text box and click **Save**. Fields marked with an asterisk (*) are mandatory.

Forums

The Forums area is where you and your centre users can share conversations, opinions, work and documents with other E-qual users. Forums and the groups of users that are attached to them are created by forum administrators. These are usually assessors, trainee assessors and centre managers.

As a centre administrator, you have access to all the forums and user groups that these forum administrators have set up. This allows you have overall control over them in case of difficulties, such as an assessor leaving the system.

At the top of the page is a dropdown menu labelled **Select forums and user groups created by:** This is a list of all forum administrators who have created forums and user groups. To view a specific person's forums and user groups, select a name from the dropdown. This will show their forums.

You can then edit details about that user's forums and user groups. You can also create and edit forums and user groups of your own by selecting your own name in the dropdown menu.

Managing forums

You can create your own forums by clicking on the **Create forum** button. A pop-up will appear for you to name your forum, give it a brief description and decide whether to allow users to add new topics in this forum or restrict it so that only you can add new topics. Click **Save** to create the new forum.

Once a forum has been created you can add users to it by clicking the **User groups** button. This will open a pop-up containing a list of all your user groups that you can add to the forum. Tick the group(s) you want to add and click **Close**.

You can view your personally created forums at any time by selecting your name from the **Select forums created by:** dropdown menu.

You can edit the details of forums by clicking the **Edit details** button. Or delete forums by clicking the **Delete** button.

How forums work

All forums contain topics. You can create a topic by clicking the **Add topic** button. Enter your topic title and description into the pop-up window. To view the contents of the topics, click on the title.

You are able to edit and delete forums and topics as you see fit. Care must be taken however, as once you have deleted a forum, all the topics, discussions and posts will be removed permanently.

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 **My forums** at the top left of the forums area or by clicking the **Go back** button.

You can add a new discussion to this topic by clicking 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.

As an administrator you can edit and delete discussions as appropriate. Care must be taken however, as once you have deleted a discussion all posts will be removed permanently.

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 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 you post text and attach a file if required. You will notice that because you chose to reply to an existing post, the text from the first post is added to the post in [quote] [/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 save 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.

As an administrator you can edit and delete posts as appropriate. If you edit a post, a line will be added to the post to show this. If you choose to delete a post, only the text content of the post will be removed and will be replaced with a message stating that you have deleted the post.

User groups

You can create or edit user groups to add to forums by clicking the **Manage users** button at the top of the page.

To add a group, click the **Create group** button. A pop-up will appear where you can give the group a name and a description. Once you have clicked **Save** you can begin to add users to this group.

To add users click the **Add users** button. In the Add users window select the role of the user(s) you want to add from the dropdown menu. Find the user you want to add to the group and tick the box to include them in the group. Continue to add users as required, you can add users from any role. Click **Save** to add the selected users.

Once you have finished creating your group you can return to the Forums page and assign it by clicking the **User groups** button and selecting that group.

You can return to a group and add or remove users at any time or delete the group completely. If you remove users from a group, they will no longer see the forums that the group is assigned to.

For a user to be able to read or contribute to a forum they must be a member of a forum user group.

Resources

The Resources area is where you and other resources administrators can add documents, weblinks and learning materials. These resources can then be accessed by other users in user groups.

As a centre administrator, you have access to all the resources and user groups that these resources administrators have set up. This allows you have overall control over these groups in case of difficulties, such as an assessor leaving the system.

At the top of the page is a dropdown menu labelled **Select resources and user groups created by:** This is a list of all resources administrators who have created resources and user groups. To view a specific person's resources and user groups, select them from the dropdown.

You can then edit details about that users resources and user groups. You can also create and edit resources and user groups of your own by selecting your own name in the dropdown menu.

Managing resources

You can create your own resources by clicking on the **Add resource** button. A pop-up will appear for you to name your resource and give it a brief description. You must them choose the type of resource and add a weblink or file as appropriate. Click **Save** to create the new resource.

Once a resource has been created you can add users to it by clicking the **User groups** button. This will open a pop-up containing a list of all your user groups that you can add to the resource. Tick the group(s) you want to add and click **Close**.

You can view your personally created resources at any time by selecting your name from the **Select resources created by:** dropdown menu.

You can edit the details of resources by clicking the **Edit details** button.

As a centre administrator, you can delete a whole resource by clicking the **Delete this resource** button. Care must be taken however, as once you have deleted a resource, all the elements of that resource will be removed permanently.

User groups

You can create or edit user groups to add to resources by clicking the **Manage users** button at the top of the page. To add a group, click the **Create group** button. A pop-up appears where you can give the group a name and description. Once you have clicked **Save** you can begin to add users to this group.

To add users click the **Add users** button. In the Add users window select the role of the user(s) you want to add from the dropdown menu. Find the user you want to add to the group and tick the box to include them in the group. Continue to add users as required, you can add users from any role. Click **Save** to add the selected users.

Once you have finished creating your group you can return to the Resources page and assign it by clicking the **User groups** button and selecting that group.

You can return to a group and add or remove users at any time or delete the group completely. If you remove users from a group, they will no longer see the resources that the group is assigned to.

For a user to be able to view a resource they must be a member of a resource user group.

Guest users

Guest users are users that you can add to E-qual to give them access to certain portfolios in your centre. This is ideal for allowing, for example, employers to view their employees work in progress.

The guest access works in conjunction with the *Companies* field in a users details. See page 15 for details. You assign a guest user to be able to view the work of candidates of a certain company or multiple companies. For example, if you have candidates in your centre working for Alpha Chemicals, you can create a guest user who can view all candidates that have been assigned the company 'Alpha Chemicals' in their user details.

Add guest user

To add a guest user, enter the new user's details into the form. Any areas that have an asterisk (*) 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 suitable for 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.

You can then assign companies to them. This will enable them to be able to view the portfolios of candidates in these companies.

To assign a company click the **Add new...** button. A pop-up will appear containing a list of all companies currently assigned in your centre. Tick the company(s) that you would like this guest to be able to view and click **Save**. When this guest accesses E-qual they will be able to view portfolios of all candidates that have been assigned the selected company(s).

Edit guest user

To edit a guest user, you need to select the user by clicking the starting letter of the user's last name from the alphabet at the top of the search area or by typing the user's 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 user's details at this point by selecting a user from the list and clicking the **Show user details** link.

To edit a user's 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.

Delete guest user

To delete a guest user, select the user you wish to delete by clicking the starting letter of the user's last name from the alphabet at the top of the search area or by typing the user's 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 user's details at this point by selecting a user from the list and clicking the **Show user details** link.

To edit a user's 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.