



e-qual
paperless portfolio

Expert Witness Advisor guide

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The expert witness advisor

An expert witness is a person who can assess the performance and knowledge of a candidate when an assessor is not available. E-qual allows user role names to be altered, so you may be known as a different role name. This does not alter the functionality of the expert witness advisor role as described below.

Each EWA has access to a number of portfolios for each qualification they are assigned to. Each of these portfolios belongs to a candidate and contains all the work that the candidate and assessor between them have created to help meet the requirements of the qualification.

The expert witness advisor does not have access to the main areas of the portfolio. They are restricted to the area where documents can be uploaded. These documents can then be used by the candidate and assessor as evidence within the portfolio.

The sections below describe each of the areas of the portfolio that can be accessed in the expert witness advisor role and how to use them. Online help is also available in the software itself by clicking the **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, you can use this page to select which of your roles you wish to login as.

In this case we are logging in as the Expert Witness Advisor role, so click the **Select** button next to Expert Witness Advisor.

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.

EWA Menu

This screen gives you can access all of the EWA's areas of E-qual.

If you have more than one role assigned to your E-qual account you can click the **Change my role** link at the top right to return to the Choose role page and enter E-qual as another role.

You can change your password and personal details by clicking the **Change my details** link. This will take you to a page that allows you to edit your those details.

Click the **Logout** link at any time to leave the E-qual system and return to the login page.

Access Portfolios

This page allows you to access any portfolios you have been assigned to.

To access a portfolio, select the qualification from dropdown menu. A list of candidates will appear. These are the portfolios you have been assigned to.

Click on the name of the candidate you wish to view. Their details will appear on the right. Click **View portfolio** to access the portfolio.

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 you 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 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.

Resources

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

Viewing portfolios

As an expert witness advisor you are able to view the File Store area of portfolios of all candidates you are assigned to. This means you can add your work to the File Store of the portfolio so that the candidate and assessor can use this as evidence against the qualification structure and in other areas.

File Store

The File Store is where you can add and organise files that are for a candidate to include in their portfolio(s).

The File Store contains a structured list of folders and files displayed by file name. Also displayed is the evidence type for each 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-qual 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, select a file and then click the **Evidence Type** button. A pop-up window will appear with a dropdown menu containing all the evidence types available. Select an option from the menu for the selected file and 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 file and click **Open**. 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 the 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.

To return to the Access Portfolios area, click the **Exit this portfolio** link at the top right of the page or click the **Access Portfolios** tab.