e-qual
paperless portfolio

Trainee Assessor guide

E-qual Paperless Portfolio | Assessor guide

The trainee assessor

The trainee assessor has a role that is very similar to that of an assessor but with a few limitations. The main differences between the two roles are trainee assessors do not have a planner and they do not have the facility to mark parts of the portfolio as completed.

The main function of the trainee assessor is to work alongside a fully qualified assessor to access each portfolio, providing guidance and support and ultimately assess the work of the candidate. E-qual allows user role names to be altered, so you may be known as, for example, the assistant tutor, the trainee mentor or the teaching assistant. This does not alter the functionality of the trainee assessor role as described below.

Each trainee assessor has access to a number of portfolios for each qualification they are assigned to. Each of these portfolios belongs to a candidate and has a File Store - a collection of documents that can be added as evidence to one or more of that candidates 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 the File Store. These documents can be attached by the candidate or an assessor 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 E-qual that can be accessed by the trainee assessor 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, use this page to select which of your roles you wish to login as.

In this case we are logging in as the trainee assessor role, so click the **Select** button next to Trainee Assessor.

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.

Menu

This screen gives you access to all of the trainee assessor's pages 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.

Manage Portfolios

This page allows you to review details about any candidates assigned to you and lets you gain access to their portfolio.

If, as a trainee assessor, you are responsible for more than one qualification, you can choose which qualification to view by selecting it from the qualification dropdown menu. Details about users you are responsible for on this qualification will be displayed.

A wide variety of information is displayed about each candidate in the following columns:

New: A star in this column indicates that the candidate has added items to the portfolio that you have not yet viewed. This allows you to focus on candidates who have added new material.

Name: The name of the candidate.

Group: Candidates can be assigned to groups by the administrator when they are placed on qualifications, to assist with categorisation.

Last accessed by candidate: The date and time when the candidate last accessed that portfolio.

Last accessed by me: The date and time when you last accessed that portfolio.

Notes: This is an area for you to add reminder notes. These notes are private to you and are not accessible by any other user. Click into the 'My notes' box and type your note. The entry is automatically saved and can be edited at any time.

Portfolio Progress: This is the progress of each portfolio. It shows the percentage of the qualification they have completed. This is calculated from the number of nodes in the qualification that have been locked or completed.

View: Click the **View portfolio** button to access that portfolio.

These details can be ordered alphabetically by each column. Click the appropriate heading to order the table by that column.

IV Reports

The IV Reports page gives you access to the sampling reports that are completed by internal verifiers about your candidate's portfolios.

To view a report for a portfolio, first select the qualification from the dropdown. A further dropdown will appear to allow you to select the candidate. Once you have selected the candidate the report will appear. An Internal Verifier dropdown menu allows you to choose which IV's report to view if the candidate has more than one IV in their portfolio team.

The report shows a list of verification questions associated with that qualification and the answers that the IV has added. It also shows a list of the parts of the qualification that the IV sampled to answer the questions and any comments that the IV has made about the portfolio.

Forums

Forums are an area 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 created or that have been assigned to by other roles in the system. As a trainee assessor you are able to create new forums and allocate them to groups of users.

You can create a new forum that can contain a group of topics by clicking the **Create forum** button. You can then give the forum a name, a 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.

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**. If you have not set up any user groups click the **Manage users** button. See *Manage Users* for more details about this feature.

These 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 a topic click the title.

As a forum administrator 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 a forum 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 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 limited 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 a forum 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.

Resources

The resources area is where you can add documents, links, learning and other content to be shared among E-qual users and also view resources that have been assigned 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.

To add a resource, click the **Add resource** button. A pop-up will appear allowing you to name your resource, give it a description and then specify what type of resource you want to create. If you tick a web link, a box will appear for you to enter the link for the resource. If the resource is a single file, a **Browse** button will appear for you to find and upload the file. If the resource is a collection of documents and files you will first have to create an E-qual Resource Package (ERP) and upload that package file. To do this you will need access to the ERP tool. The ERP tool has its own guidance for use.

Once you have created a resource you can assign a group, or groups, of users to it. To do this click the **User groups** button. A pop-up will appear 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**. If you have not set up any user groups click the **Manage users** button. See *Manage Users* for more details about this feature.

Manage Users

This area is for the creation of user groups and is applicable to Forums and Resources. Click the **Manage users** button to open the popup. Although Forums and Resources both use an identical process for creating groups, the groups that you create are independent to either Forums or Resources.

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 or 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 forums or resources that the group is assigned to.

Viewing portfolios

As a trainee assessor you are able to view the portfolios of all candidates you are actively assessing. This means you can contribute to and assess each piece of work within the portfolio and decide whether the candidate meets your assessment criteria.

You are able to add your own documents and assign them to the appropriate areas in each portfolio as well as lock documents and whole areas of the portfolio as you consider them to be completed. You have the facility to leave messages for candidates and internal verifiers in relation to the work taking place in the portfolio. Then finally, as parts of the qualification structure are satisfactorily completed, you can sign off each part as complete, eventually leading to a 100% completed portfolio.

Whilst you are carrying out this assessment role, other portfolio team members - internal and external verifiers - can be monitoring the process as frequently as they require.

The sections below describe each of the areas of the portfolio that can be accessed once you have clicked the **View portfolio** button in the Manage Portfolios area, and how to use them.

Portfolio menu

This menu screen gives you access to all areas of a candidates portfolio. The menu is split into 2 areas, Document Management and Portfolio. To view a particular page click the relevant menu button.

At the bottom of the menu screen are the candidates personal details. Alongside these are the details of the Portfolio Team. These are the people who will work with you on this portfolio.

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

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

To leave a portfolio and return to the Manage Portfolios page, click **Exit this portfolio** in the top menu bar or the menu area.

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 a list of 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 the have been added.

When you view a portfolio, any new discussions that have been added for your attention since your last view 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 the candidate's portfolio(s). The File Store is shared between all of that user's portfolios. The File Store is only available to you and the candidate.

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.

Planning

This area is used 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 window. 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.

As a trainee assessor you can lock documents, to prevent them from being removed, if you consider them to be suitable for inclusion in the final portfolio. To lock a document click on the green open padlock icon. It will change to a red locked padlock icon. You can unlock the document again by clicking on the locked padlock icon. Neither you or the candidate will 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 the candidate is 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 when work on the particular statement will start.

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

Actual Completion Date is a date when work on the particular statement has been completed.

To add a date select the appropriate node in the tree then click the **Select date** button for the date you want to add. A calendar will appear for you to select the date. The date will then appear in that node of the tree. To remove a date click the **Clear date** link

The selected tick box (**SEL**) allows you to choose which parts of the qualification structure the candidate should attempt. Other portfolio users can see the status of the selected boxes, only you can change them. Any statements selected here will become visible and available to attach evidence to in the Portfolio Evidence area.

The Tools area at the bottom of the page gives you access to your discussions. Click the Discussions button to open them in a popup 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 window. 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.

As a trainee assessor you can lock documents, to prevent them from being removed, if you consider them to be suitable for inclusion in the final portfolio. To lock a document click on the green open padlock icon. It will change to a red locked padlock icon. You can unlock the document again by clicking on the locked padlock icon. Neither you or the candidate will 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 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 the candidate.

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 a node has been locked. 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 window. 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 popup 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.

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.

Down 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 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 the 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 file name.

Across from the document file names is a collection of columns. Each of these columns represent 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 part of the qualification structure that is locked or marked as Completed. These are indicated by a locked padlock or an 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. The nodes of the qualification structure that require marking as Completed are displayed in a tree structure.

When members of the portfolio team, who can mark areas as Completed, are happy with the work for a node they tick the box under their role name. A date will be displayed next to the tick 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.