



Portfolio Admin Guide

Guide for admin users

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Introduction

This user guide is designed to provide documentation for people who will use this portfolio on a day-to-day basis. This document is designed to be read and used as a reference by any user of the system.

Support and contact details

How we support you and your portfolio

The first line of support is always provided by the respective companies. Olive will be providing the company support staff with training on the platform.

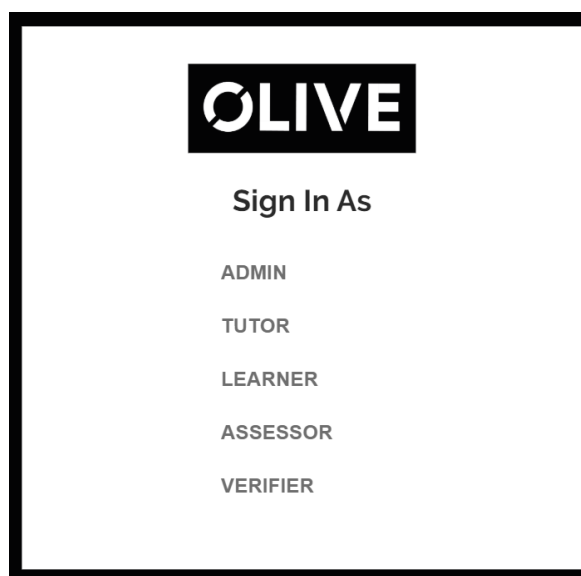
For any support related queries please contact our 24/7 support team at support@olivegroup.io

Logging In

Clicking on the Login Link, you will be taken to the Login page. Login link looks like

[https://\(Your Org_domain\).connectedportfolio.com](https://(Your Org_domain).connectedportfolio.com)

From here you can select the user type that has been assigned to you.



Once you have clicked on the relevant usertype you will be taken to the screen where you can enter your username and password.

Forgot Password

If you have forgotten the password to your account, you can click "Forgot Password" in the learner user state.



OLIVE

Sign In As Learner

User Name / Email

User Name / Email

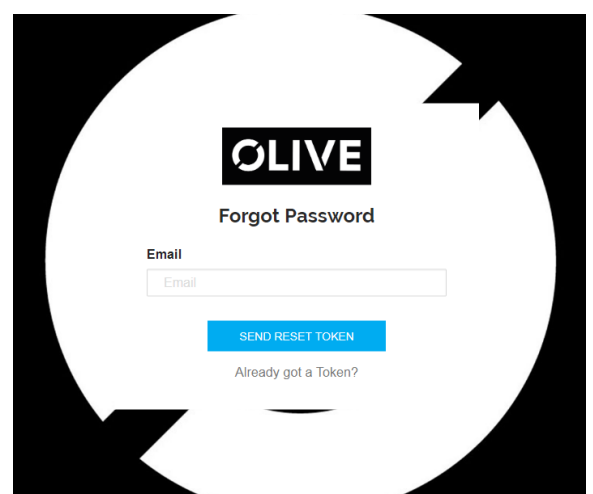
Password

Password

LOGIN

Forgotten Password?

Here you can add your "Email Address" and click on "**Send Reset Token**" and a token that will be sent to your email address.



OLIVE

Forgot Password

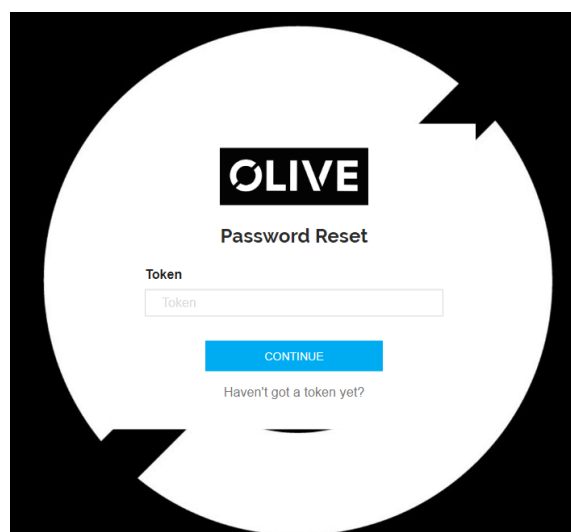
Email

Email

SEND RESET TOKEN

Already got a Token?

Once you have the token you can enter it and this will take you to the Reset password screen, where you can enter your new password for your account.



User Types

There are 5 different user types in the E-Portfolio which are Admins, Client Admins, Learners or Apprentices, Tutors and Verifiers

To Note: These names can be changed to suit the need of the company as required

Administrators

Administrators are the people in the parent company who are responsible for creating the programmes, clients and admins for the respective clients, they can also be given the ability to add learners and assign programmes to learners themselves.



Client Administrators

These are delegated admins of the client who are responsible for creating the learners, assigning them the proper course and work hours and details.



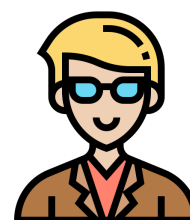
Learners or Apprentices

These are the students/apprentices who will be learning the programmes and taking training from their Tutors and adding the relevant information of their learning into the system



Tutors

These are the teachers who will be responsible for mentoring the learners and assigning them works to do, and will be responsible to answer any queries the learner has on the topics.



Verifiers

The Job of a verifier is to conduct apprenticeship/award quality control activities to ensure service outputs. This will be measured against the RN training/AO requirements whilst in the training establishment.





Administrator User Guide

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Administrators

Dashboard/Homepage

Once you have logged into your Admin Account you will be taken to the Dashboard/Home Page as shown below,

[Home](#)
[Tutor](#)
[Learner](#)
[Programme](#)

Account

Demo Admin
 My Virtual Tutor (Demo)
 +44 7739636956 myvtdemo@olivegroup.io

Programmes

+ Add More

Search 7 programme

Instructor Led Live Sessions
 View Programme >

Team Leader / Supervisor
 View Programme >

First Aid Response (FAR)
 View Programme >

Customer Service Practitioner
 View Programme >

Education Example
 View Programme >

Corporate Example
 View Programme >

The Complete Skilled Negotiator
 View Programme >

Client

+ Add More

Search 4 Tutor...

Olive Tutor
 Number of Programme: 4
 Learner Enrolled: 8
 View >

Dylan Kavanagh
 Number of Programme: 0
 Learner Enrolled: 0
 View >

Brendan Kavanagh
 Number of Programme: 0
 Learner Enrolled: 0
 View >

Jordan Lee
 Number of Programme: 0
 Learner Enrolled: 0
 View >

Account Information
 This section give you a glance of your account details, your name, company information, Contact information (Mobile and Email Address)

Demo Admin
 My Virtual Tutor (Demo)
 +44 7739636956 myvtdemo@olivegroup.io

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Programmes

The Programmes section gives you a list of all the Programmes that have been currently created in the system.

Click on **" + Add "** to go to the programme builder.

Click on **"More"** to see the full list of Courses that have been created on the system.

Also you can use the search functionality in the system to search for programmes that have been created.

To Note: This list shows all the programmes including published and on-edit programmes

Programmes

[+ Add](#)
[More](#)
 Search 7 programme


Instructor Led Live Sessions

[View Programme >](#)


Team Leader / Supervisor

[View Programme >](#)


First Aid Response (FAR)

[View Programme >](#)


Customer Service Practitioner

[View Programme >](#)


Education Example

[View Programme >](#)


Corporate Example

[View Programme >](#)


The Complete Skilled Negotiator

[View Programme >](#)

By clicking on the **"More"** button you will be taken to the full list of programmes, but this will be covered in more detail in the Programmes Section

Clients

The Clients Section will show you a glimpse of all the clients within your organisation.

Click on **" + Add "** to go to the Add Client Page.

Click on **"More"** to see the full list of clients that have been created on the system.

Also you can use the search functionality in the system to search for clients in the system.

Client

[+ Add](#)
[More](#)
 Search 13 Client...


KTM Hub Portfolio Client

Number of Programme: 23
Learner Enrolled: 2

[View >](#)


Client

Number of Programme: 2
Learner Enrolled: 0

[View >](#)


New Client of Hiup

Number of Programme: 0
Learner Enrolled: 0

[View >](#)


New Client of Hiup

Number of Programme: 0
Learner Enrolled: 0

[View >](#)


New Client of Hiup

Number of Programme: 0
Learner Enrolled: 0

[View >](#)

By clicking on the **"More"** button you will be taken to the full list of clients, but this will be covered in more detail in the Clients Section.

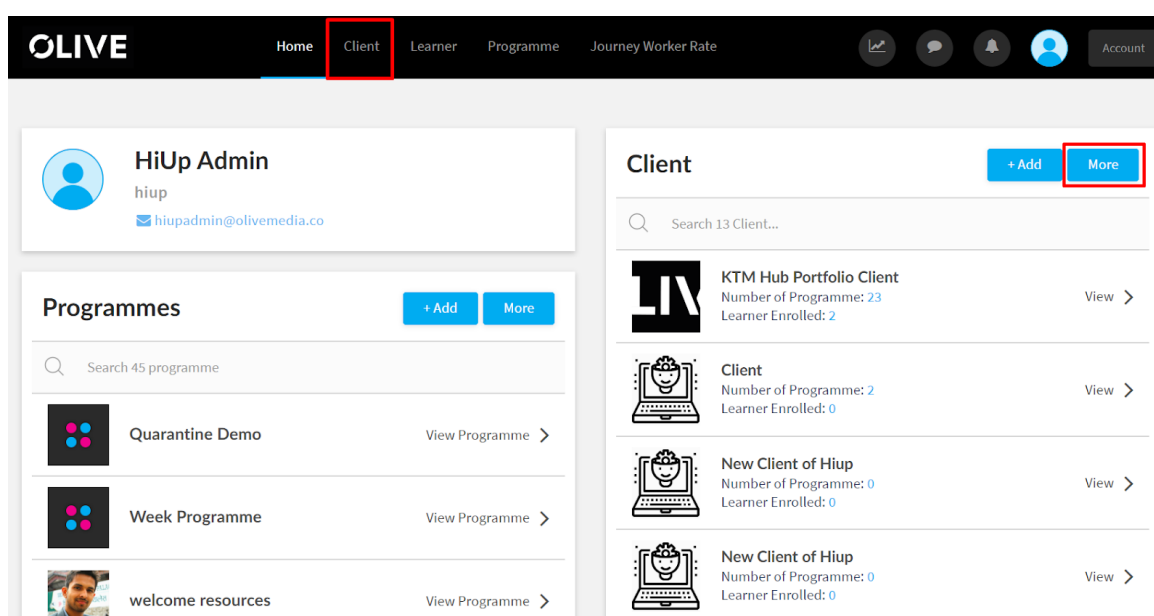
Navigation Banner



The Navigation bar takes you to various pages within the system. Clicking on "Home" will take you to the home page, you can also Navigate to the homepage by clicking the company logo on the Top Left Corner.

Client Section

There are two ways to reach the client page, this can be done by clicking on the Clients Tab in the Navigation Banner or by Clicking More in the Client Section of the Homepage.



Below is an example of the client section,

OLIVE
Home
Client
Learner
Programme
Journey Worker Rate
Account

Client

Create New Client

Search 13 Client...

▼ Name



KTM Hub Portfolio Client
Number of Programmes: 23
Learner Enrolled: 2

Delete
View >



Client
Number of Programmes: 2
Learner Enrolled: 0

Delete
View >



New Client of Hiup
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



New Client of Hiup
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



New Client of Hiup
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



New Client of Hiup
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



Generic Hiup Client 1
Number of Programmes: 2
Learner Enrolled: 2

Delete
View >



Generic Hiup Client
Number of Programmes: 1
Learner Enrolled: 1

Delete
View >



HiUp September 2019
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



Hup Test Client
Number of Programmes: 1
Learner Enrolled: 4

Delete
View >

You can load more clients by clicking on the "Load More" button at the bottom of the page.



Generic Hiup Client 1
Number of Programmes: 2
Learner Enrolled: 2

Delete
View >



Generic Hiup Client
Number of Programmes: 1
Learner Enrolled: 1

Delete
View >



HiUp September 2019
Number of Programmes: 0
Learner Enrolled: 0

Delete
View >



Hup Test Client
Number of Programmes: 1
Learner Enrolled: 4

Delete
View >

Load More

You can know about the number of programmes assigned to the client and the number of learners by looking at the details beside each client.



KTM Hub Portfolio Client

Number of Programmes: 23

Learner Enrolled: 2

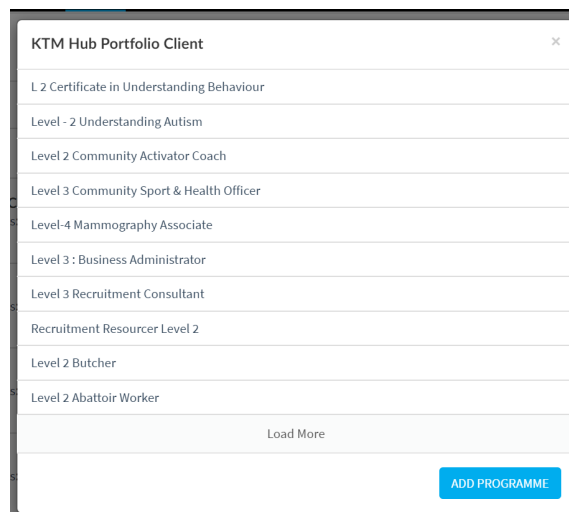
11

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You can delete a particular client clicking the **"Delete"** button beside the client.



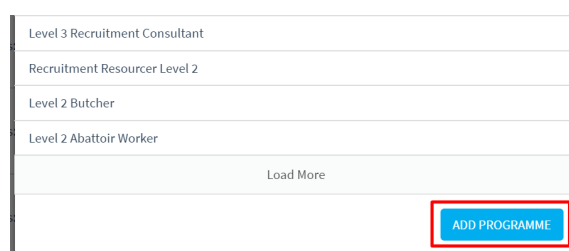
To View all the programmes that have been assigned to a client you can click on **"View"**. To view more assigned programmes you can click on **"Load More"**



Adding Programme to a Client

To Add a Programme to a client, you can select the Client from the Client Section and Click on View then click on Add Programme.

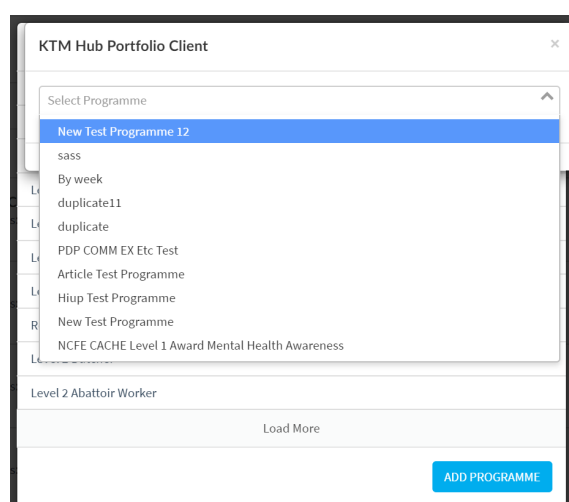
To View all the programmes that have been assigned to a client you can click on **"View"**. To view more assigned programmes you can click on **"Load More"**



This will bring up the search list for all the programmes that have been published in the system.

Once you have found the programme you can click on **"Add Programme"** and this will add the programme to the particular client.

To Note: Programmes will show up here only if the programme has been published after it has been created.



Adding a New Client

As mentioned above you can click on the **"Add"** button from the homepage or click on **"Create New Client"** in the Client Section to create a new client. This will bring up the Client creation page as shown below.

The screenshot shows the 'Add Client' form within the OLIVE application. The top navigation bar includes the OLIVE logo and links for Home, Client, Learner, Programme, and Journey Worker Rate. On the right, there are icons for analytics, chat, notifications, a user profile, and an 'Account' button. The form itself is titled 'Add Client' and contains the following fields:

- CLIENT NAME: Client Name
- TAX NUMBER: Tax Number
- EMAIL: Email
- FIRST NAME: First Name
- LAST NAME: Last Name
- PHOTO: A placeholder image icon and an 'Upload Image' button.

At the bottom of the form, there are two buttons: 'CANCEL' on the left and 'ADD CLIENT' on the right.

Here you can add the necessary information like the **Client Name, Tax Number, Email address of the Admin of the Client Organisation, First Name of the Admin, Last Name of the Admin and Photo.**

Once the Information has been added you can click on **"Add Client"** to add this Client and Client Administrator.

To Note: Once this process has been completed, a registration email will be sent to the new Client Admin to create his **username and password** and log into the system.

Learner Section

To Navigate to the learner section you can click on the learner tab on the Navigation banner and this will take you to the Learner Section.

OLIVE
Home Client **Learner** Programme Journey Worker Rate

HiUp Admin
 hiup
 hiupadmin@olivemedia.co

Programmes
+ Add More

Search 45 programme

Quarantine Demo View Programme >

Week Programme View Programme >

Client
+ Add More

Search 13 Client...

KTM Hub Portfolio Client
 Number of Programme: 23
 Learner Enrolled: 2 View >

Client
 Number of Programme: 2
 Learner Enrolled: 0 View >

New Client of Hiup
 Number of Programme: 0
 Learner Enrolled: 0 View >

Following is an example of the Learner Section from the Administrator view of the system.

OLIVE
Home Client **Learner** Programme Journey Worker Rate

Learner

Search 127 Learner...

Name	Organization	Programme	Progress	
Wage Learner	KTM Hub Portfolio...	Customer Service Specialist Level 3	0% COMPLETE	View >
New User	KTM Hub Portfolio...	Customer Service Specialist Level 3	0% COMPLETE	View >
New User	KTM Hub Portfolio...	Level 3 Recruitment Consultant	NAN% COMPLETE	View >
new learner	HIUP Client	By week	100% COMPLETE	View >
Subham Karki	HIUP Client	Level 3 Personal Trainer	35% COMPLETE	View >
Test Email	HIUP Client	Level 2 Supply Chain Operator	0% COMPLETE	View >
Dinesh Learner	HIUP Client	Level 3 Team Leader	12% COMPLETE	View >
HiUP Learner	HIUP Client	duplicate	0% COMPLETE	View >
Sam Lannin	Hup Test Client	Level 3 Team Leader	0% COMPLETE	View >
Sam Lannin	Hup Test Client	Level 3 Personal Trainer	0% COMPLETE	View >

Load More

This page shows the learners from all the clients under the organisation, with what programme they are doing and the progress in the programme.

To Search for a learner you can use the search bar and search for the name of the particular learner.

Learner

Search 127 Learner...		
Name	Organization	Programme
Wage Learner	KTM Hub Portfolio...	Customer Service Specialist Level 3

To view an indepth status of each student you can click on the "View" button beside each learner to see the Course Progress Page.

Progress

0% COMPLETE

View >

0% COMPLETE

View >

NAN% COMPLETE

View >

Below is an example of the Course Progression Page,

[Home](#)
[Client](#)
[Learner](#)
[Programme](#)
[Journey Worker Rate](#)

Account

[BACK TO LEARNER](#)

[View Target](#)
[View Wage meter](#)
[Delete](#)

Subham Karki

Level 3 Personal Trainer

✉ skarki@yopmail.com

WELCOME RESOURCES

Welcome!!!	25/25	Completed
------------	-------	-----------

100% COMPLETE

25/25

KNOWLEDGE

Knowledge	25/25	Completed
-----------	-------	-----------

100% COMPLETE

25/25

SKILL

Skills	25/25	Completed
--------	-------	-----------

100% COMPLETE

25/25

JOURNALS

Journal	25/25	Completed
---------	-------	-----------

25% COMPLETE

50/200

QUALIFICATIONS

Qualification: Unit 1 Principles of exercise, fitness and health (A/600/9017)	25/25	Completed
Unit 2 Instructing gym-based exercise (A/600/9020)		Not Started
Unit 3 Anatomy and physiology for exercise(H/600/9013)	25/25	Completed
Unit 4 Know how to support clients who take part in exercise and physical activity(M/600/9015)	0/25	Not Started
Unit 5 Health, safety and welfare in a fitness environment(T/600/9016)	0/25	Not Started
Unit 6 Anatomy and physiology for exercise and health (A/600/9051)	0/25	Not Started
Unit 7 Programming personal training with clients (F/600/9052)	0/25	Not Started

Here you can see the students' progression in the various sections of the programme. To go into each section you can click on the relevant sub title under the section and it will show the submitted answers and materials and approval status of them.

An Example has been shown below,

WELCOME RESOURCES

Welcome!!!

Completed

100% COMPLETE

25/25

KNOWLEDGE

Knowledge

25/25

Completed

100% COMPLETE

25/25

SKILL

Skills

25/25

Completed

OLIVE

[Home](#)[Client](#)[Learner](#)[Programme](#)[Journey Worker Rate](#)

Account

CHECKLIST :: KNOWLEDGE

Anatomy, Physiology & Kinesiology

Human movement such as biomechanics, anatomy and physiology such as the cardiorespiratory, musculoskeletal, nervous and endocrine systems and the implications of long and short term exercise on these systems.



hiup

test

Approved

Lifestyle Management and Client Motivation

The range of factors that contribute to an individual's lifestyle such as dietary intake, stress, fatigue, alcohol and levels of physical activity.



test

Approved

How to assess clients' readiness to change their behaviour and how to apply a range of appropriate change strategies



Approved

Only Assessors can mark a submitted material by a student as approved, we will be looking into it at (insert heading here)

Mailing Students

To mail a student you can click on the email link in under the students name and this will prompt you to choose your mailing software.

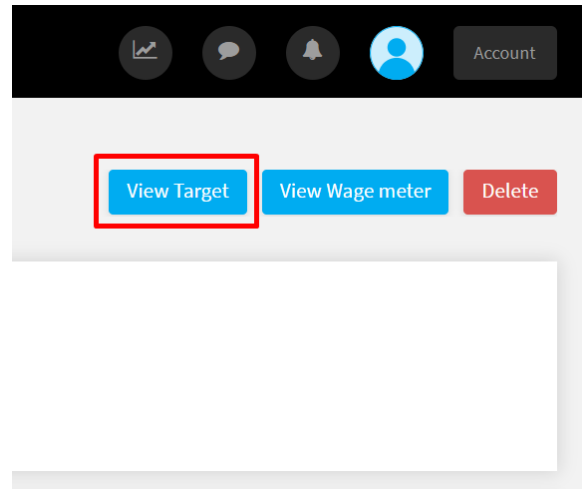


Subham Karki
Level 3 Personal Trainer
skarki@yopmail.com

Viewing Targets

Learning Targets can be set by the Tutor, Client Admin and student or yourself as the admin, as a guide on when the particular session needs to be completed by.

To View this Click on "View Targets" beside the student name and this will take you to the Targets Page for that particular student.



OLIVE
Home Client Learner Programme Journey Worker Rate

Account

[Add Target](#)

31 March 2020	Master Session View
	Progress Target 37% Progress Made 18% HiUp Assessor Assessor
22 April 2020	Null View
	Progress Target 50% Progress Made 100% Subham Karki Learner
25 March 2020	Qualification View
	Progress Target 25% Progress Made 20% HiUp Client Admin Employer

This page provides you with the list of Targets that has been set.

Each Target gives you,

1. Due Date for the Target
2. What Section the Target comes under
3. Required Progress for the Section
4. Current Progress made in the Session
5. Who Assigned the Target

By Clicking on "**view**" beside each Target you will be able to see the comments and review section of each Target.

Targets - Comments

By Clicking on the "**Comments**" section you can see all the comments that have been added to this particular target.

The "**Add Comment**" button will let you add comments into the particular Target.

To cancel the changes you can click on "**Cancel**" or to save you can click on "**Save**"

Targets - Review

Clicking on "**Review**" will let you add a review to the particular target if it has been completed on time or if it hasn't.

The screenshot shows the 'Target / Observation' interface. At the top, there's a header with 'Target / Observation' and two links: 'Comment' and 'Review'. The 'Review' link is highlighted with a red box. Below the header, there's a text input field containing 'test'. To the right of the input field is a blue button labeled 'Add review'. Below this, there's a card for 'Hiup Verifier', a learner who was 2 weeks before. The card shows a profile picture, the name 'Hiup Verifier', the role 'Learner', and the status '2 weeks before'. To the right of the card is a text input field containing 'great' and a blue icon.

The "**Add Review**" button will let you add the review into the particular Target.

To cancel the changes you can click on "**Cancel**" or to save you can click on "**Save**"

The screenshot shows the 'Target / Observation' interface. At the top, there's a header with 'Target / Observation' and two links: 'Comment' and 'Review'. The 'Review' link is highlighted with a red box. Below the header, there's a text input field containing 'test'. To the right of the input field is a blue button labeled 'Add review'. Below this, there's a card for 'Hiup Admin', an admin. The card shows a profile picture, the name 'Hiup Admin', the role 'Admin', and the status '2 weeks before'. To the right of the card is a text input field containing 'great' and a blue icon. Below the card, there are two buttons: 'Cancel' and 'Save'.

Targets - Adding Targets

To add a target click on "**Add Target**" button on the top right of the page and this will take you to the Add Target Screen as shown below,

The screenshot shows the 'Add Target' screen. At the top, there's a header with 'Journey Worker Rate' and several icons: a bar chart, a speech bubble, a bell, a person, and an 'Account' button. Below the header, there's a blue button labeled 'Add Target' highlighted with a red box. Below this, there's a card for 'Target / Observation'. The card has a header with 'Target / Observation' and two links: 'Comment' and 'Review'. The 'Review' link is highlighted with a red box. Below the header, there's a text input field containing 'test'.

OLIVE Home Client Learner **Programme** Journey Worker Rate Account

< BACK View Targets

Target For Level 3 Personal Trainer

Phase / Week Master Session

Date From 07-04-2020

Date To 08-04-2020

Target Progress 80%

Target Description

Paragraph B I :: := @ “ ” ↶ ↷ 🖼

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent in eros ex. Curabitur non est condimentum, ultrices lacus nec, tempus lectus. Sed purus ligula, mattis at tincidunt a, rutrum eu nunc, Aenean porttitor magna nec libero maximus, id facilisis elit sodales. Nullam pulvinar sit amet dui a sollicitudin. Nam in lectus sit amet sem hendrerit dictum. Proin porta orci tempus diam varius tincidunt. Suspendisse non placerat ante.

Curabitur id nunc orci. Nam consectetur sed justo non hendrerit. Sed quis dapibus ex. Ut vitae urna lectus. Praesent non neque sit amet

Cancel Submit

Here you can set the **Phase or Week** of the section the target is assigned to, the **starting and ending date of completion** of set target, the **required progress** and a **description of the target**.

Once you are happy you can click **"Submit"** to add the Target to that particular student or click **"Cancel"** if you want to delete it.

Programme Section

To Navigate to the Programme Section you can click on the **"More"** under the programme section of the homepage or click on the Programme tab in the Navigation bar.



This will bring you to the Programmes section which shows all the programmes and you can create your own programmes from here. An example has been shown below.

OLIVE
Home
Client
Learner
Programme
Journey Worker Rate

Programme

Create New Programme

Q

Search 45 Programme

	Name	Phases	Status	
	Quarantine Demo	1	Draft	Publish Clone Edit Delete
	Week Programme	3	Draft	Publish Clone Edit Delete
	welcome resources	14	Draft	Publish Clone Edit Delete
	Cloned Programme	14	Draft	Publish Clone Edit Delete
	New Test Programme 12	14	Published	Clone Edit Delete
	sdsds	0	Draft	Publish Clone Edit Delete
	sass	0	Published	Clone Edit Delete
	By week	6	Published	Clone Edit Delete
	Customer Service Specialist Level 3	4	Published	Clone Edit Delete
	duplicate11	2	Published	Clone Edit Delete

Load More

You can search for programmes by using the search option.

To Delete a programme you can click on the delete button beside the programme and this will delete the programme.

To Note: Deleting a programme will remove that programme for all learners and all

Programme



Name

Phases

Publish

Clone

Edit

Delete

progress on that particular programme will be lost for all learners.

To Edit an already existing programme you can click on the Edit button

To Note: This is recommended only for draft programmes and not published programmes.



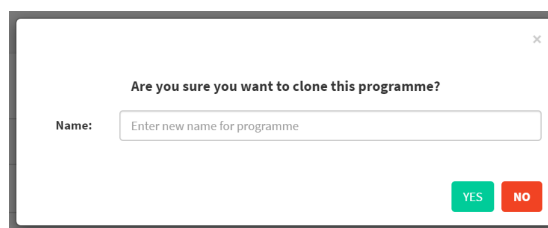
Cloning a Programme

To Clone an existing programme you can click on the **"Clone"** button,



This will bring up the Clone creation dialog box as shown, here you can type in the name of the new cloned programme.

You can click on **"YES"** to clone the programme or **"NO"** to abort the cloning process.



To Note: Cloning a large programme takes a bit of time, please refresh the page in 5-10 mins to be sure all the information has been cloned.

Publishing a Draft Programme

To publish a draft programme you can click on the **"Publish"** button beside the programme.

To Note: Only when a programme is published will the programme show up when you want to add this to a client.



Creating a new Programme

To Create a new programme you can click on the **"+ Add"** button under the programme section of the Homepage or click on the **"Create New Programme"** under the Programme Section, this will open the Programme builder.

Programme

Create New Programme

Search 45 Programme

Name	Phases	Status	
 Quarantine Demo	1	Draft	Publish Clone Edit Delete
 Week Programme	3	Draft	Publish Clone Edit Delete

Add Programme

The first page as shown below will ask for the **Programme Name**, the **logo for the programme**, a **description about the programme** and if the programme is a **timed programme** you can tick the **"has weeks"** tick box in the end.

Add Programme

PROGRAMME NAME:

PROGRAMME LOGO: 

DESCRIPTION:

HAS WEEKS: ☐ ← Tick this if this programme is a timed programme

Difference between Timed and Standard Programmes

There are two ways of setting up a programme. With a weekly layout or in a standard format.



If you choose to set up a weekly programme you will be given the option to enter a week number at the top of each phase. This will segment the phase into the week that you have chosen.

If you do not choose the weekly format your programme will follow the standard layout and each phase will be divided by phase type.

Once the information has been added and confirmed you will be taken to the Edit Programme page as shown below,

OLIVE

[Home](#)
[Client](#)
[Learner](#)
[Programme](#)
[Journey Worker Rate](#)

Account

Edit Programme ✕

Name:

Quarantine Demo

Description:

Demo

Arrange

BY WEEKS

EDIT

ADD WELCOME RESOURCE

ADD PHASE

To Edit the initial information that was added you click on the "Edit" button, and this will take you to the initial page where you can change the necessary details.

EDIT

ADD WELCOME RESOURCE

ADD PHASE

Welcome Resource

This first section supports the learner with basic introduction to the programme, along with further information on how to use the online resource to maximise your learning and development experience.

To Add the Welcome Resource you can click "Add Welcome Resource" and this will take you to the screen below,

ADD WELCOME RESOURCE

ADD PHASE

OLIVE
Home
Client
Learner
Programme
Journey Worker Rate

Account

Edit Programme

NAME

Welcome

DESCRIPTION

Welcome to your Level 3 Team Leader Apprenticeship programme. Click the links below to find out a bit more about your learning journey.

RESOURCE LINK

https://www.instituteforapprenticeships.org/apprenticeship-standards/team-leader-supervisor/

DOCUMENT

Choose File

No file chosen

VIDEO

Link

Raw

https://vimeo.com/313961880

CANCEL

SAVE

Admin Edit View

Here you can add the **Name** for the welcome resource, **description**, **link to the programme** in the company website for additional information, **add documents like company handbooks** and if you have a **video that can accompany the welcome resource** this can be either added as a link or as a raw video file.

[Click here to see how this looks from a learner view](#)



The Following formats can be added in the Document: .pdf,
Video Link: Youtube or Vimeo Links
Raw Files: .mp4

Adding Phases to your programme

To add a phase to your programme you can click on the "Add Phase" button and this will open the Edit Programme Phase window as shown below.

EDIT

ADD WELCOME RESOURCE

ADD PHASE

OLIVE
Home
Client
Learner
Programme
Journey Worker Rate

Account

Edit Programme

WEEK

Week

DAY

Day

PHASE NAME

Phase Name

DESCRIPTION

Paragraph

B

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↷

🖼️

START DATE

Start Date

HH:mm

END DATE

End Date

HH:mm

PHASE TITLE

Phase Title

THIS PROGRAM PHASE IS

(*Select Any One Option, This Will Be Locked After Save)

☐

BEHAVIOUR

☐

ON JOB TRAINING LOG

☐

MASTER SESSION

☐

END POINT ASSESSMENT

☐

FINAL REVIEW

☐

SKILL

☐

PERSONAL DEVELOPMENT PLAN

☐

EXERCISE

☐

OFF JOB TRAINING LOG

☐

QUALIFICATION

☐

GATEWAY ASSESSMENT

☐

JOURNAL

☐

KNOWLEDGE

☐

ARTICLE

☐

LIVE SESSION

☐

COMMUNICATION FORUM

PHASE SCORE

Phase Score

DURATION

Minutes

Minutes

CANCEL

SAVE

Week and Day

When setting up a particular phase you can set the particular week and day. This will select where the phase will sit.

To Note: This will work only if the programme is a timed programme.

WEEK

0

DAY

1

Phase Name

This will show up under the category overview section. For example if we set up multiple phases in a particular category the phase name will show on the learner program view so that the learner can tell the difference between phase types.

Behavior



Behaviours Log 1



Behaviours Log - Review 1

Description

When a user clicks into a particular phase the phase description will be displayed at the top of this page. Please see below example:

Behaviour

Behaviours Log 1

Please use the below section to identify short development plans against each of the listed 'Behaviour' criteria at the start of each quarter (every 3 months) and then review your development against these plans at the end of that quarter.

If you require any further support, please speak to your trainer/assessor or Learning Support Coach who will be more than happy to help.

1.0 Takes responsibility

1.1 Drive to achieve in all aspects of work. Demonstrates resilience and accountability.

Start and End Date

This particular feature is for if a programme has content to be released at specific times. For example if a learner is to have content released to them on a specific date and only for a particular period of time. By setting the start and end dates the content will become available on the start date and access will be revoked upon the end date.

START DATE

Start Date

HH:mm

END DATE

End Date

HH:mm

Phase Selection

Each phase type has different characteristics applicable to it. Some phase types have form builders whereas others will display content and allow the user to upload documents. When setting up a phase please select one of the checkboxes and then name the phase. Different phases available in the system are shown below,

THIS PROGRAM PHASE IS

(*Select Any One Option, This Will Be Locked After Save)

☐

BEHAVIOUR

☐

ON JOB TRAINING LOG

☐

MASTER SESSION

☐

END POINT ASSESSMENT

☐

FINAL REVIEW

☐

SKILL

☐

PERSONAL DEVELOPMENT PLAN

☐

EXERCISE

☐

OFF JOB TRAINING LOG

☐

QUALIFICATION

☐

GATEWAY ASSESSMENT

☐

JOURNAL

☐

KNOWLEDGE

☐

ARTICLE

☐

LIVE SESSION

☐

COMMUNICATION FORUM

Phase Score

If this phase is part of the weighting system you can add the score that it contributes to the overall programme here.

PHASE SCORE

Phase Score

Duration

Whatever amount is entered in this box when the phase is completed the amount of minutes

DURATION

Minutes

will be deducted from the learners off the job activity automatically.

To Note: The time needs to be added in minutes.

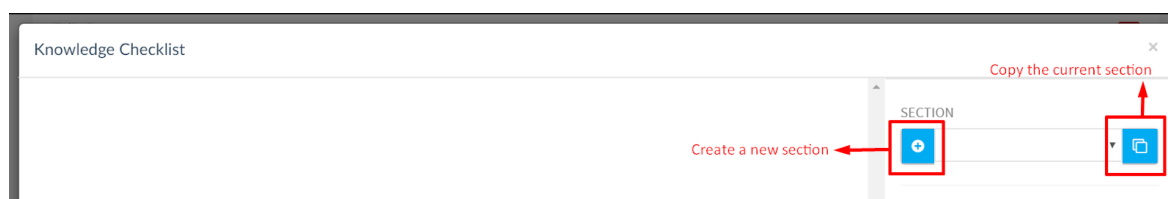
Once you are happy with the selection you have made you can click "**Save**" and this will add the Phase to the programme.

Phase and how they work

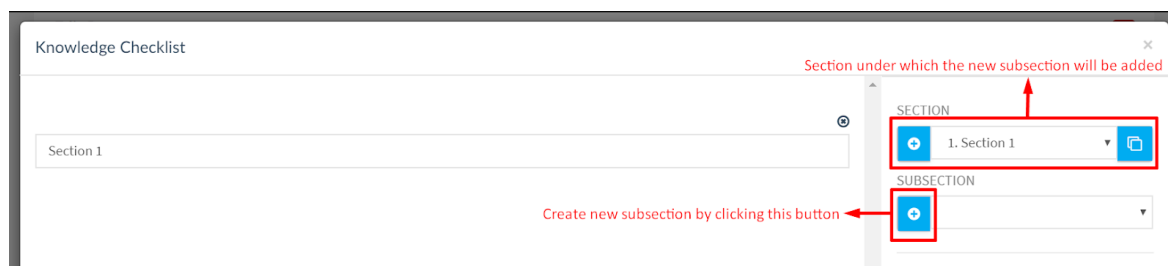
Knowledge

This is the information, technical detail, and 'know-how' that an individual needs to have and understand to successfully carry out the duties that make up the occupation. Some knowledge will be occupation-specific, whereas some may be more generic, for example health, safety and environment legislation.

To create a new section you can click on the + button as shown below and if you want to create a copy of the current section you can click the copy button.



Once you have created your section, the add subsection option will come as shown below,



Once you have added in your information relevant to all the knowledge it should look like the following,

The screenshot shows the OLIVE Knowledge Checklist interface. The main area lists knowledge items with expandable sections. The sidebar on the right shows a tree view of sections and subsections.

Knowledge Checklist

- 1. Interpersonal excellence – managing people and developing relationships
 - 1.1 Leading People - Understand different leadership styles and the benefits of coaching to support people and improve performance
 - 1.2 Managing People - Understand people and team management models, including team dynamics and motivation techniques. Und
 - 1.3 Building Relationships - Understand approaches to customer and stakeholder relationship management, including emotional inte
 - 1.4 Communication - Understand different forms of communication and their application. Know how to chair meetings, hold challeng
- 2. Organisational Performance - delivering results
 - 2.1 Operational Management - Understand how organisational strategy is developed. Know how to implement operational/team plan

SECTION

- 1. 1. Interpersonal excel

SUBS

- 1. 1. Interpersonal excellence – managing
- 2. 2. Organisational Performance - delive
- 3. 3. Personal Effectiveness – managing

[To see this from a learners perspective click this link](#)



To Note: When you are adding subsections be mindful of which section you are adding the subsection into.

Skills

skills are the practical application of knowledge needed to successfully undertake the duties that make up the occupation. They have to be learnt through on and/or off-the-job training or experience. They do not need to be expressed in the workplace context, because the duties are expressed in this way.

Skills should not be a repetition of the duties or tasks. For example, the skills relating to the duty 'produce bread products,' will include use tools and equipment, follow instructions, select ingredients, measure ingredients, mix ingredients, complete quality assurance etc.

Skills can be created the same way as Knowledge was, a completed Skills section will look like the following in Admin View.

[To see this from a learners perspective click this link](#)

Behaviors

Behaviours are mind-sets, attitudes or approaches required for competence, generally across the entire occupation. Whilst these can be innate or instinctive, they can also be learnt, so they are effectively a subset of skills.

Behaviours tend to be very transferable meaning that they may be more similar across apprenticeship standards than knowledge and skills.

Examples include, team worker, adaptable and professional. Give examples of how behaviours may be demonstrated to help differentiate the requirements of behaviours for different occupations/levels: Professional, for example represents themselves/employer well, presentable, passion for product, ambassadorial nature, instils confidence.

In the behavior section you have 2 options,

Type

B

This is the first behavior type you want to start with and this asks the first initial questions with an overall rating on the particular behavior

Type

A

Once the Type B behavior has been created it needs to be duplicated again for A, the difference being when students put content in B it starts to added into A for review



How to Use Behaviors

Behaviors are competence checkers, so let's say the programme is 12 months long, there can be 3 behaviors every 4 months.

For the first month it will be Type B, then the rest 3 will be Type A. Each time the development plan is pulled into the new one, this helps the student set self goals and take initiatives.

To create a Type B form you can click on the Type B form under the behavior drop down that comes once you have ticked the programme type as Behavior.

BEHAVIOUR

[Add Behaviour Type A](#)

[Add Behaviour Type B](#)

This will open the Behavior Checklist editor type B and you can click on the "+Section" to add your first section as shown below,

To see this from a learners perspective click this link

You can add a new section by pressing the "+section" button and to add a new subsection you can select from the added sections in the list as shown to your right and click "+FormData" to create your new subsection.

To create a Type A form you can click on the Type A form under the behavior drop down that comes once you have ticked the programme type as Behavior.

BEHAVIOUR

[Add Behaviour Type A](#)

[Add Behaviour Type B](#)

This will open the Behavior Checklist editor type B and you can click on the "+Section" to add your first section as shown below, as you can see the Type A has a new box that says review, where the content from the type B or previous Type A's will be pulled.

CHECKLIST :: BEHAVIOR

+Section
+FormData

Section Title

Sub Title

How would you rate your behaviour on this task
You last scored yourself:

1 2 3 4 5

Review

Development Plan

SAVE

[To see this from a learners perspective click this link](#)



To Note:

The review side of the behaviors will work only once the previous section of the checklist has been filled by the learner and is seen only from the learner's perspective and not in the programme building stage.

Mastersessions

These are your classroom training sessions converted into digital format, this is where most of your learning will be happening. Each masterclass has its own resource section where you can upload relevant documents that the learners can download during the session or any document the student needs to upload on successful completion or during the masterclass session.

COURSE

GUIDELINES +

CANCEL

team leader

Alacrity - Team Leader Masterclass Session 1
Alacrity - Team Leader Masterclass Session 2
Team Leader Masterclass Session - 1
Team Leader Masterclass Session - 2
Team Leader Masterclass Session - 3

Once You have selected a masterclass as your programme phase, you have the ability to choose what course needs to be added to the particular masterclass.

You can add multiple courses to your masterclass session as shown below,

COURSE

Select Course

Team Leader Masterclass Session - 1  Team Leader Masterclass Session - 2  Team Leader Masterclass Session - 3 

GUIDELINES 

To add any necessary documents you can click on the "+" button besides the guideline section and this will bring the browse option as shown below,

GUIDELINES 

Here you can browse for the files from your system and multiple files can be uploaded onto a single masterclass.

Once the file has been uploaded you can give the file a name to show up when the student looks at the mastersession.



Supported file types for upload
Documents: .doc

Once all the masterclasses has been uploaded a typical masterclass list should look like this,

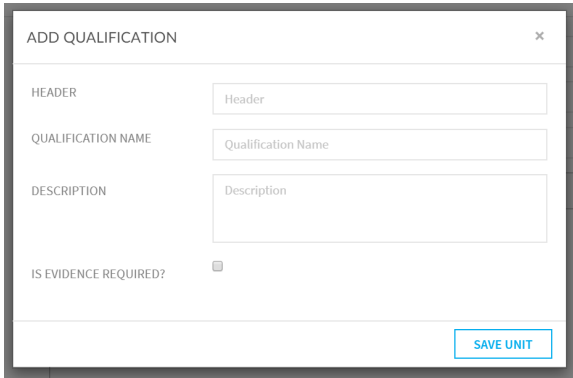
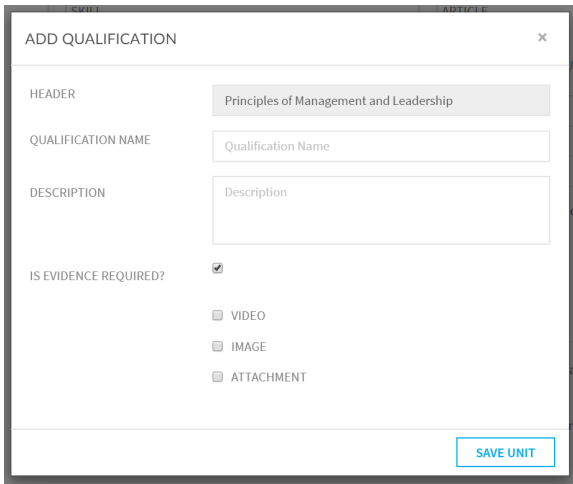
Master Session

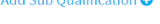
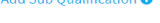
 Masterclass Session - 1		
 Masterclass Session - 2		
 Masterclass Session - 3		
 Masterclass Session - 4		
 Masterclass Session - 5		
 Masterclass Session - 6		
 Masterclass Session - 7		
 Masterclass Session - 8		
 Masterclass Session - 9		
 Masterclass Session - 10		
 Masterclass Session - 11		

[To see this from a learners perspective click this link](#)

Qualification

Once a student has completed their masterclass they can start answering the qualifications section. To create a qualification section click on 'Qualification' as the type and this will bring the option to add qualification as shown below,

DURATION Minutes QUALIFICATION Add Qualification +	
Clicking on “Add Qualification” will open the Add Qualification window as shown to the side. Header is the section heading and the qualification name is where you would type in the qualification name, Description for the section title. By clicking the “Is Evidence Required” tick box, learners will have the ability to upload evidence.	
Once the box is ticked, the system will ask for what type of evidences can be uploaded, • Videos • Images, and • Attachments	IS EVIDENCE REQUIRED? ☒ ☐ VIDEO ☐ IMAGE ☐ ATTACHMENT
Once the qualification heading has been added and saved, the option to add the sub-qualification option will come up as shown here,	1. Be able to develop and use a personal development plan (Principles of Management and Leadership) * 1.1 Outline the governance of different types of organisations * 1.2 Explain the factors which influence an organisation's culture * 1.3 Explain the purpose of organisational mission, vision and value statements * 1.4 Outline the purpose of organisational strategies Add Sub Qualification +
The add sub-qualification screen is similar to the qualification one but as you can see the header which is the parent qualification has already been filled. If you need evidence to be attached you can click on the checkbox and select the needed evidence types.	

QUALIFICATION	1. Be able to develop and use a personal development plan (Principles of Management and Leadership)  * 1.1 Outline the governance of different types of organisations  * 1.2 Explain the factors which influence an organisation's culture  * 1.3 Explain the purpose of organisational mission, vision and value statements  * 1.4 Outline the purpose of organisational strategies  Add Sub Qualification 
	2. Understand the knowledge, skills and behaviours to be an effective manager (Principles of Management and Leadership)  * 2.1 Explain the knowledge and skills required to be an effective manager  * 2.2 Summarise the behaviours required to be an effective manager  * 2.3 Explain the impact of knowledge, skills and behaviours on the team, colleagues and customers  Add Sub Qualification 
	3. Understand the management role (Principles of Management and Leadership)  * 3.1 Summarise the role of the manager  * 3.2 Explain the role of the manager in communicating organisational strategy to individuals and teams  * 3.3 Explain levels of accountability and authority in the management role  * 3.4 Outline the legal and organisational frameworks which apply to the management role  Add Sub Qualification 
	4. Understand the application of management and leadership approaches (Principles of Management and Leadership)  * 4.1 Explain the differences between management and leadership  * 4.2 Summarise recognised management and leadership approaches  * 4.3 Explain how management and leadership approaches can be applied and adapted in different work based situations  Add Sub Qualification 
	1. Understand the role and purpose of teams (Managing a Team to Achieve Results)  * 1.1 Define the purpose of teams  * 1.2 Explain types of teams in an organisation  * 1.3 Summarise the roles in a team using a recognised theory  * 1.4 Explain how members of a team affect team dynamics  * 1.5 Identify the advantages and disadvantages of team working and lone working  Add Sub Qualification 
	2. Be able to recognise the characteristics of a high performing team (Managing a Team to Achieve Results)  * 2.1 Outline the characteristics of high performing team  * 2.2 Discuss behaviours which can be observed in a high performing team  Add Sub Qualification 
	3. Know how to lead, communicate with and motivate a high performing team (Managing a Team to Achieve Results)  * 3.1 Identify advantages and disadvantages of leadership styles that can be used to manage a high performing team  * 3.2 Assess communication methods used for different types of teams  * 3.3 Explain how to motivate a team to achieve results  Add Sub Qualification 

The above is an example of a qualification from Admin creation side
To see this from a learners perspective click this link

Off the Job Training Log

(Description on what is OFTJ Log)

To create an Off Job Training Log you can tick the Programme phase as "Off Job Training Log", this will bring up the option to set the timings as shown below,

DURATION	0	Weeks
HOLIDAYS	6	Weeks

NOTE: If a student has weekly learning hours, then his/her required Off the Job hours will be **0 hours**

To see this from a learners perspective click this link

Here you can add the duration of the programme in weeks, how many holidays there are and the weekly learning hours, a sample calculation has been shown below.

DURATION	150	Weeks
HOLIDAYS	10	Weeks

NOTE: If a student has weekly learning hours, then his/her required Off the Job hours will be **140 hours**

On the Job Training Log

(Description on what is ONTJ Log)

Similar to the Off Job Training Log you can click on the On Job Training log and set the hours for the apprentice to meet the training requirement as shown below,

DURATION	2000	Hours
ACTIVITY	Portfolio Training	
	Activity name	Add

To see this from a learners perspective click this link

Duration is the **total hours needed for the On The Job Training**, and you can set activities by typing the name of the activity in the activity box and clicking "**add**", this will be added as sections where the learners will log their hours.

Learner Journal

A learner journal is an area where learners will be able to add content like a diary where they can upload evidence to further support their learning process.

To create a learner journey, after the relevant details have been added click on "Journal" as the phase type for this phase and the Journal will be created.

- | | |
|--|---|
| ☐ BEHAVIOUR | ☐ OFF JOB TRAINING LOG |
| ☐ ON JOB TRAINING LOG | ☐ QUALIFICATION |
| ☐ MASTER SESSION | ☐ GATEWAY ASSESSMENT |
| ☐ END POINT ASSESSMENT | ☒ JOURNAL |
| ☐ FINAL REVIEW | ☐ KNOWLEDGE |
| ☐ SKILL | ☐ ARTICLE |
| ☐ PERSONAL DEVELOPMENT PLAN | ☐ LIVE SESSION |
| ☐ EXERCISE | ☐ COMMUNICATION FORUM |

To see this from a learners perspective click this link

Gateway Assessment

The Gateway Assessment ensures that all apprentices have completed the mandatory aspects of the occupational standard and that any work underpins specified assessment methods. It creates confidence in employers that once an apprentice passes the Gateway Assessment they are occupationally competent.

To create a gateway assessment click on "Gateway Assessment" as the Program Phase. Once this has been selected you will have the option to select the type of Assessment as shown.

GATEWAY ASSESSMENT

[Add Gateway Assessment Type A](#)

[Add Gateway Assessment Type B](#)

Gateway Assessment A is used for **Practice testing** and students will upload evidence of their Practice testing and comment on areas that need further development. To Create a Type A Gateway Checklist click on Save and this will create a Type A Checklist.

CHECKLIST :: GATEWAY



Please upload any practice testing completed here, and comment on any areas that you feel you need to further develop.

Click here to Add the Checklist →

SAVE

To see this from a learners perspective click this link

Gateway Assessment B is used as a checklist for aptitude tests that needs to be verified by the Learner, Client Admin and Assessor. Once you have clicked it will take you to a form builder as shown below,

CHECKLIST :: GATEWAY



+ Section

← To add a new question click the "+section" button

Gateway Assessment

← Click here to change the name of the checklist

How has the student fared in the 1 year programme
Has the student developed a set of skills that will help him in the future

Click "X" beside the question to remove it →



Click "Save" to Save the checklist →

SAVE

You can change the name of the checklist, add new questions and delete them using the form builder and once you are happy with the questions you can click "Save" to apply the changes.

To see this from a learners perspective click this link

Final Review

This phase is made available for assessor or verifier to add the review of the work done by students.

To add a review section to the programme, select the phase type as Final Review and this will add the review section to the programme. The following is an example from the learner view of the review section.

Reviews



Not Enough Content

1/8/2019

View >

Good Job on 1.1

30/8/2019

View >

We will be looking into more depth about the reviews in the Assessor and Learner section respectively.

End Point Assessment

End Point Assessment. End Point Assessment (EPA) is the final assessment for an apprentice to ensure that they can do the job they have been training for. EPA is separate to any qualifications or other assessment that the apprentice may undertake during the on-programme stage of the apprenticeship.

To add an EPA you can click the Program Phase as "End Point Assessment" and click on "Add End Point Assessment" in the dropdown as shown on the right.

END POINT ASSESSMENT

Add End Point Assessment +

This will open the checklist builder as shown below

CHECKLIST :: ENDPOINT
×

Overall Apprenticeship Outcome

N/A
Select the ranking from "passed" to "failed here"

Assessment
Add what was the name of the Assessment here

Outcome
Add the outcome of the assessment here

Certificates



Upload the Assessment certificates by clicking the icons

Add more
To add more upload section click on "Add More"

Save the current progress
→
SAVE

Here you can select the ranking, what assessment the learner is being ranked on and the outcome with the certificates attached to the learner.

To see this from a learners perspective click this link

Articles - Week Specific Phase Type

Articles are document repositories where you can upload documents that can then be viewed by learners, like documentation, textbooks etc which don't fall under the masterclasses.

DOCUMENTS
+

BROWSE

+

To create an article section, click on the program phase as "Article" and the document upload option will come up as shown above.

From here here you can add multiple documents and assign them names for how it would look in the learner view.

To see this from a learners perspective click this link



Week Specific Phases

Note that the week specific phases will work only if the "Has Weeks" tick box when the programme is created.

Personal Development Plan - Week Specific Phase Type

Live Session - Week Specific Phase Type

To add a Live session to the programme, select the week and day for the live-session and the name of the session, select the Phase Type as "Live Session" and click on "Save" this will create the live session in the programme.



To Note:

Once the live session has been created the Client Admin will be able to create the room and add members to the call. To see how this works click on this link.

Exercise - Week Specific Phase Type

You can submit the response for the custom form available here with this section. Your consultant can interpret and feedback your submitted response. The form builder also can segregate questions that can only be answered by a particular user type like the (admin, learner or the employer)

To Access the form builder you can click on "Exercise" as the Program Phase type and this will bring the Checklist option at the bottom as shown on the right.

CHECKLIST

Update +

The form builder will look like the one below.

Here you can create a section using the "+" button beside Section and giving the section a Name. Once the section has been created you can click on the "+" beside the subsection and give the sub-section the name.

There are 5 different types of question types in the form builder

Text - This is used for small text

Text Area - This can be used where larger text is needed

Radio - Choose between multiple options (only one can be chosen)

Checkboxes - Choose between multiple options (multiple options can be chosen)

Select - Select one from the dropdown

To see this from a learners perspective click this link

Communication Forum - Week Specific Phase Type



Publishing your programmes

Make sure you publish your programme after you have completed creating it in order to add it to a client. To know how to publish your programme [click the link here](#).

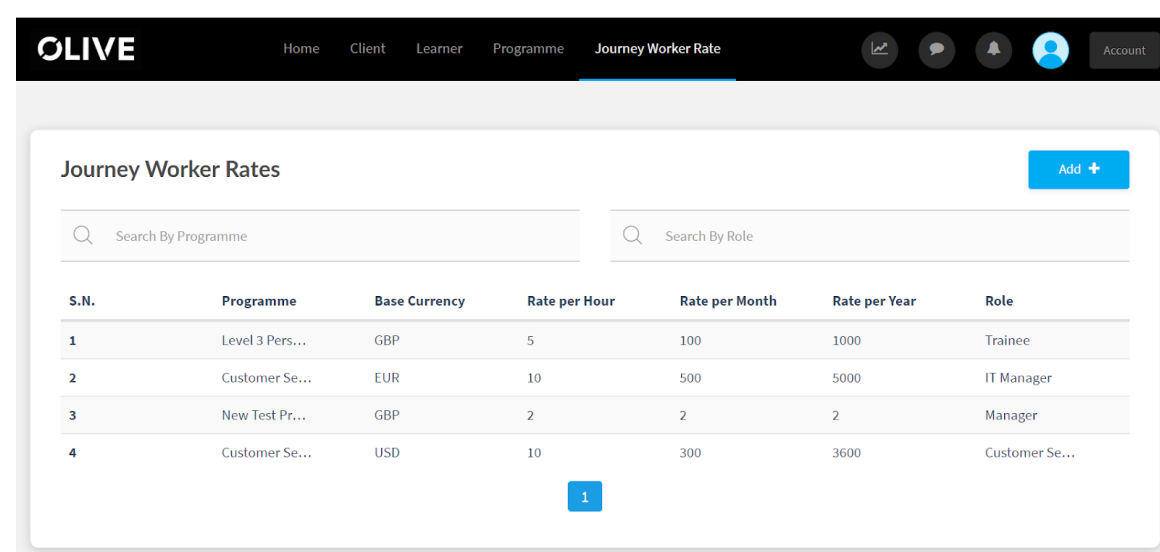
Journey Worker Rate

(What is Journey Worker Rates?)

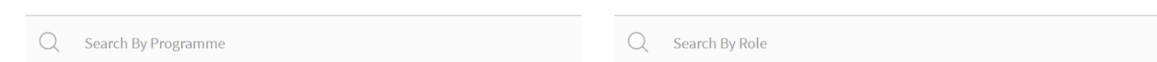
In order to set the Journey worker rates click on the "Journey Worker Rates" tab on the Navigation bar and this will take you to the Worker rates page.



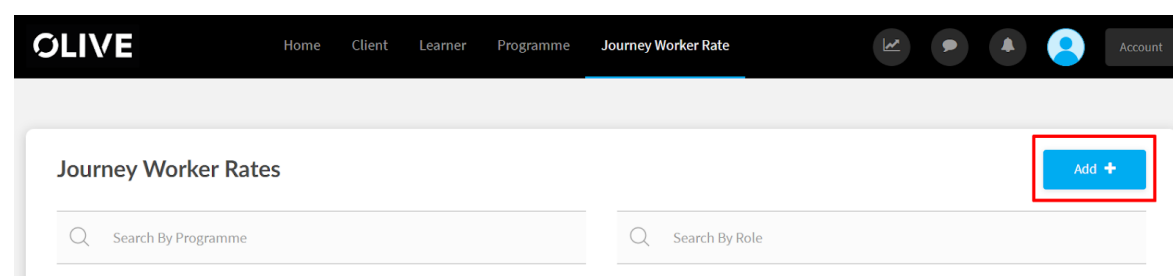
A typical Journey Worker Rates page should like like below



You can search the page based on Programme and based on Role as well



To add a new rate you can click on the "Add +" button on the top right hand side of the page as shown below,



This will take you to the "Add Journey Worker Rate Page"

Add Journey Worker Rate

Programme:	Customer Service Specialist Level 3	X v
Base Currency:	£	X v
Rate per Hour:	£ 0	
Rate per Month:	£ 0	
Rate per Year:	£ 0	
Role:	Role	

Add

Here you can fill in the following information,

- ❖ **Programme** - Select the programme you want the Worker Rate to be added to
- ❖ **Base Currency** - Type of Currency (GBP, EUR, USD and AUD)
- ❖ **Rate Per Hour**
- ❖ **Rate Per Month**
- ❖ **Rate Per Year**
- ❖ **Role** - The role of the person in the company

Journey Worker Rates

If the company has a policy of Assigning Apprentices Journey Worker Rates and also providing incentives to Learners, this can be added and tracked using the Journey Worker Rates tab in the Navigation Banner as shown below,

This will open the Journey Worker Rates page as shown below,

Journey Worker Rates

Add +

Search By Programme

Search By Role

S.N.	Programme	Base Currency	Rate per Hour	Rate per Month	Rate per Year	Role
1	Software Tes...	USD	19	0	0	Junior- Tester
2	Software Tes...	USD	20	0	0	Mid Level- T...
3	Software Tes...	USD	25	0	0	Professional...

1

Here as the Admin you will be able to Search for Rates by Programme and Role by using the Search Options

Journey Worker Rates

[Add +](#)

To Add a new Worker Rate you can click on the "Add+" button and this will open the Journey Worker Rates Creation Page as shown below,

Add Journey Worker Rate

Programme:	Select a programme		→ Select the Programme for which the Journey Rate is Applicable
Base Currency:	£		← Select the Currency Here
Rate per Hour:	£ 0		
Rate per Month:	£ 0		
Rate per Year:	£ 0		
Role:	Role		← Type in the Job Type for which this Journey Rate is Applicable

[Add](#)

Here you can select the programme for which the Journey Rate is Applicable, then select the currency.

The Rate per hour, day and Year depends on how the increment to wages are given in the company. Only one needs to be selected for the Rate per time.

Finally we can put in the Role for which this Journey Rate is Applicable to,

Once you are happy with the Rates that have been created, you can click "Add" to add this new rate to the Worker Rate List.

The Wages will be applicable for all the clients to whom the programme with the Associated Wage Rate is added to.

To see the Client Admin workflow for Assigning Worker Rates please click the [link](#).

Reporting

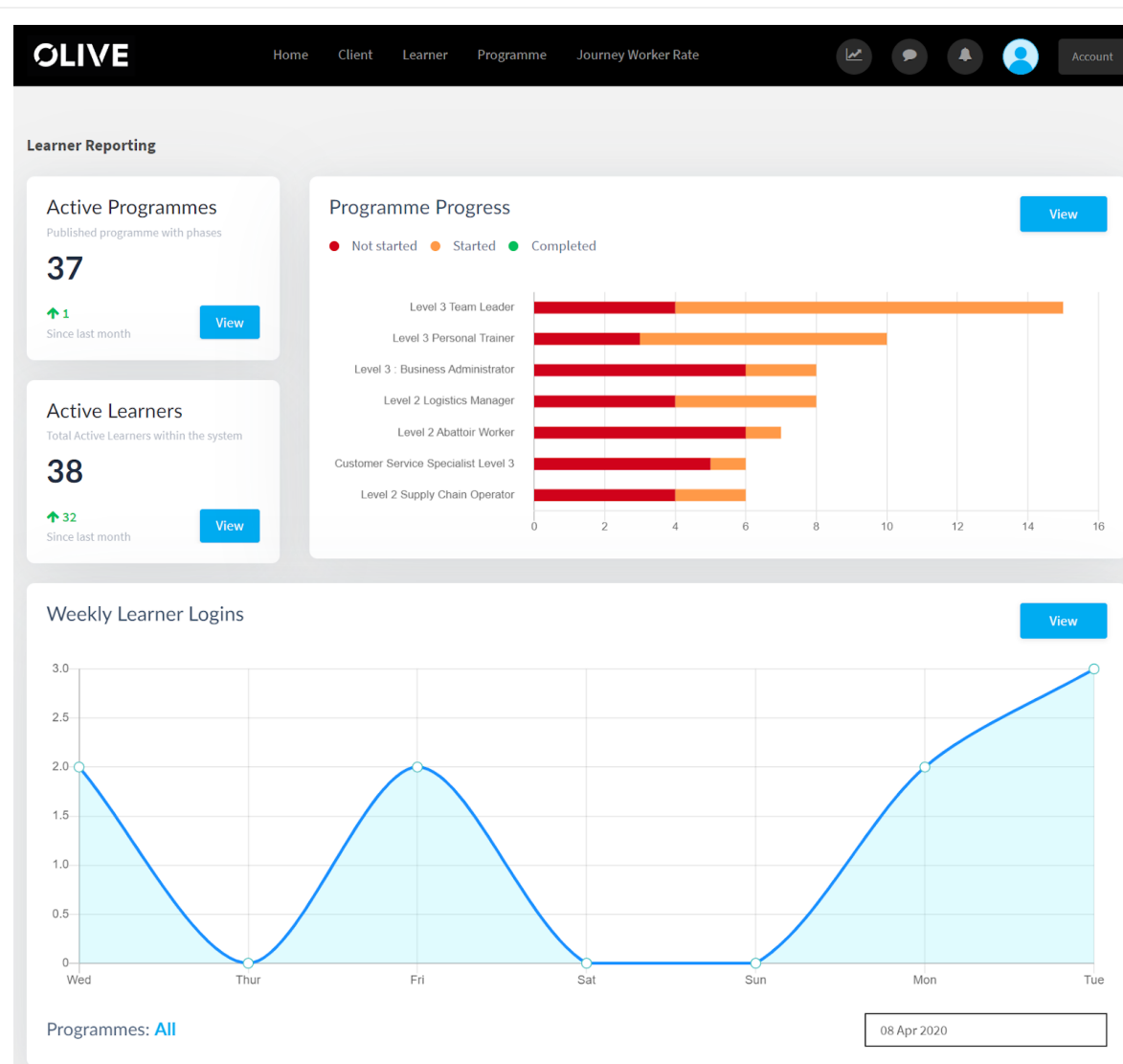
The Reporting Dashboard aims to give the admins an overall view of all the clients and student progress without having to actually go into each learner, this gives a more cumulative view of the whole organisation.

To see the reporting dashboard click on the reports button in the navigation bar as shown below,



This will open up the main reporting dashboard as shown below, the reporting dashboard has 4 main sections,

- ★ Active Programmes
- ★ Active Learners
- ★ Programme Progress
- ★ Weekly Learner Logins



Active Programmes

In the active programmes section, you will be able to see the published programmes and the ones with active learners.

By Clicking on view you will be able to get the full list of active programmes in your organisation as shown below.

Active Programmes

Published programme with phases

37

↑ 1

Since last month

[View](#)

OLIVE

[Home](#)
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[Journey Worker Rate](#)

Account

[Learner Reporting](#) / [Active Programme Detail](#)

Export

Programme	No of Client	No of Learner	Not Started	Started	Completed
New Test Program...	0	0	0	0	0
By week	1	2	1	1	0
Customer Service S...	2	6	5	1	0
duplicate11	1	0	0	0	0
duplicate	1	1	1	0	0
PDP COMM EX Etc T...	1	4	3	1	0
Article Test Progra...	1	2	2	0	0
Hiup Test Program...	2	3	3	0	0
New Test Programme	1	4	4	0	0
NCFE CACHE Level ...	1	1	0	1	0

1

2

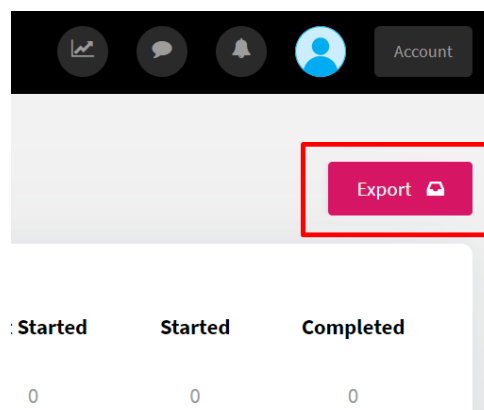
3

>

This view gives information on the following for each of the active programme,

- Number of clients the programme has been assigned to
- Number of learners currently in the programme
- Number of learners who have not started the programme
- Number of learners who have started the programme
- Number of Learners who have completed programme

To Export the list as a spreadsheet or as an excel file you can click the export button on the top right of the screen.



Active Learners

In the active learners section you will be able to see all the learners who are active on the system.

By Clicking on View you will get the full list of learners as shown below,

Active Learners

Total Active Learners within the system

38

↑ 32

Since last month

View

OLIVE

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[Programme](#)
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Account

Learner Reporting / Login Details

Export

Q Search...

01 Jan 2010

08 Apr 2020

Filter By Client

Filter By Assessor

Filter By Verifier

Apply filter

	Client	Created At	Last Login At	
New User	KTM Hub Portfolio Cli...	2/4/2020	2020-04-03 08:20:18	View >
new learner	HIUP Client	26/3/2020	2020-03-26 14:28:49	View >
Subham Karki	HIUP Client	20/3/2020	2020-03-20 17:28:01	View >
Test Email	HIUP Client	20/3/2020	2020-03-20 11:06:07	View >
Sam Lannin	Hup Test Client	28/8/2019	2020-02-13 12:40:41	View >
hiup Learner 13124	HIUP Client	31/1/2020	2020-03-26 19:40:56	View >
hiup Learner 13123	HIUP Client	31/1/2020	2020-01-31 07:01:44	View >
hiup Learner 13122	HIUP Client	31/1/2020	2020-01-31 07:01:20	View >
hiup Learner 13121	HIUP Client	31/1/2020	2020-01-31 07:00:46	View >
hiup Learner 13120	HIUP Client	31/1/2020	2020-01-31 07:00:12	View >

1

2

3

>

Filtering Learners

You can search for a particular member of filter the results based on the following criterias,

- **Filter by Date** - You can enter a start and end date here and click apply filter and this will show all the members that were created between those dates

01 Jan 2010

08 Apr 2020

- **Filter by Client** - You can choose this and select a particular client to see only members from that one client

Filter By Client ▼

- **Filter by Assessor** - Here you can choose an assessor and filter all the students that he is mentoring.

Filter By Assessor ▼

- **Filter by Verifier** - Here you can choose the verifier and filter all the students based on the verifier.

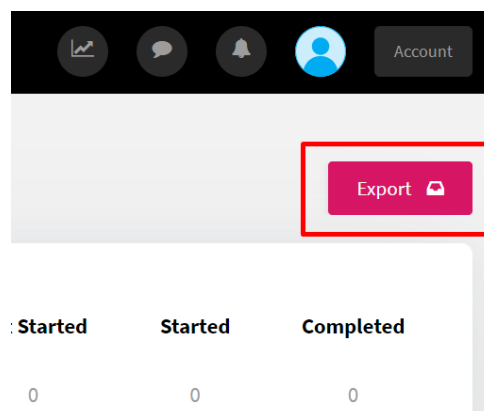
Filter By Verifier ▼



Applying the Filter

Please make sure you click on the Apply Filter button once you have set your filtering option to filter the results.

To Export the list as a spreadsheet or as an excel file of the results you have just generated using the filtering functionality, you can click the export button on the top right of the screen.



Individual Learner Login Timings

To know the logins of a learner you can click on the "View" button beside the name of each learner and this will show you the timing log of all the learner's logins.



Dinesh Learner

HIUP Client

13/5/2019

2020-04-07 14:14:59

View >

A usual login log would look like the one below, showing who the assigned Assessor and Verifier is, with the Login timings for the learner. This can also be downloaded using the "Export" button on the top right of the page.

OLIVE
Home Client Learner Programme Journey Worker Rate

Account

Learner Reporting / Login Details / Dinesh Learner
Export

Assessor

New Feature Assessor

Verifier

new feature Verifier

Date	Time	Date	Time
7/4/2020	14:14	3/2/2020	07:26
7/4/2020	07:32	31/1/2020	14:09
3/4/2020	13:58	31/1/2020	12:37
3/4/2020	13:47	30/1/2020	07:19
1/4/2020	07:43	28/1/2020	11:52
27/3/2020	14:45	28/1/2020	11:16
26/3/2020	14:08	23/1/2020	08:41
25/3/2020	13:58	23/1/2020	08:20
23/3/2020	13:16	22/1/2020	09:17

Programme Progress

This gives you from the first page a glimpse of the latest programmes and their status based on how many students have not started, started and completed the program. Hovering over one of the bars will give the actual number of students in all 3 sections of completion. By clicking on view, you will be able to go in more detail.



[Home](#)
[Client](#)
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[Journey Worker Rate](#)

Account

[Learner Reporting](#) / [Programme Progress](#)
Export

Filter By Client

Filter By Programme

Filter By Phase

Filter By Status

APPLY FILTER

	Client	Programme	Progress	Status	
	Wage Learner	KTM Hub Portfolio Cli...	Customer Service Sp...		Not Started View
	New User	KTM Hub Portfolio Cli...	Customer Service Sp...		Not Started View
	New User	KTM Hub Portfolio Cli...	Level 3 Recruitment ...		Not Started View
	new learner	HIUP Client	By week		Not Started View
	Subham Karki	HIUP Client	Level 3 Personal Trai...		Started View
	Test Email	HIUP Client	Level 2 Supply Chain ...		Not Started View
	Dinesh Learner	HIUP Client	Level 3 Team Leader		Started View
	HiUP Learner	HIUP Client	duplicate		Not Started View
	Sam Lannin	Hup Test Client	Level 3 Team Leader		Not Started View
	Sam Lannin	Hup Test Client	Level 3 Personal Trai...		Started View

1

2

3

>

The above is an example of an in depth Programme Progress screen and here we can see the Learner, which organisation the learner belongs to, what programme they are doing, the current progress, status (not started, started, completed).

Filtering Programmes

Programmes can be filtered similar to learners based on various criteria such as,

- **Filter by Client** - You can choose this and press filter to show all the learners in that particular client.

Filter By Client

- **Filter by Programme** - You can choose your programme here and filter the learners who are doing that particular programme.

Filter By Programme

Once a programme is selected you can further select,

- **Filter by Phase** - Here you can choose any phase like behavior, qualification, masterclass etc and filter based on that for that particular programme.

Filter By Phase ▼

- **Once a phase has been selected you can further select, Filter by Status** - Here you can choose to filter the phase based on Not Started, Started and Completed.

Filter By Status ▼



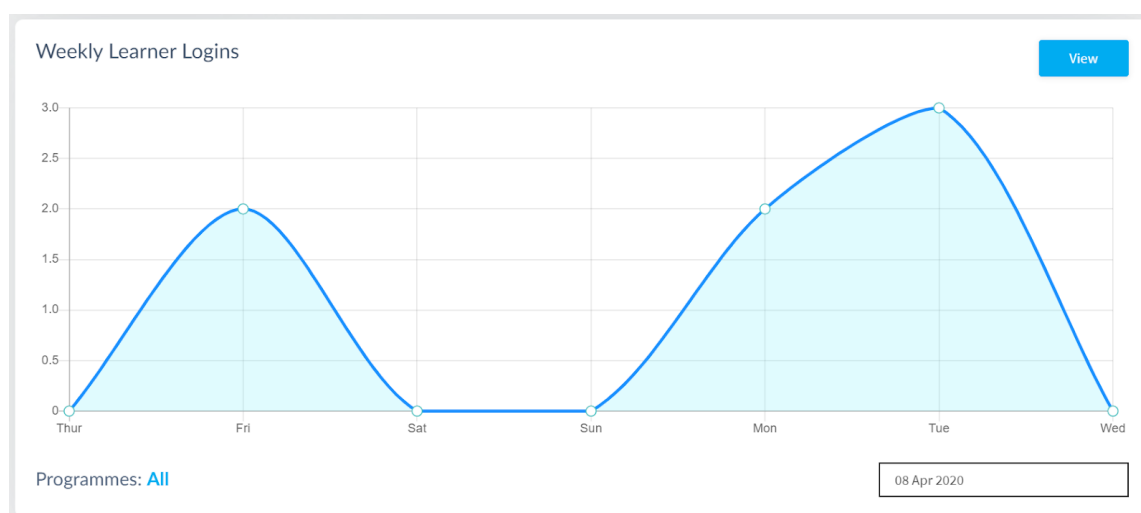
Dependent Filters

Filter by Phase and Filter by status are dependent filters and in-order to activate them, the previous filter must be set.

Filter by Programme > Filter by Phase > Filter by Status

Weekly Learner Logins

The weekly login information gives a graph of the number of logins per day for a week, if you need to change the time you can click on the date at the bottom to the required date and it will show that week's login information.



By clicking on view this will give a more in-depth look of the login details as shown below,

Learner Reporting / Login Details Export

Search...

01 Apr 2020 08 Apr 2020 Filter By Client Filter By Assessor Filter By Verifier Apply filter

	Client	Created At	Last Login At	
New User	KTM Hub Portfolio Cli...	2/4/2020	2020-04-03 08:20:18	View
Generic Learner5	HIUP Client	14/7/2019	2020-04-07 15:39:50	View
HiUp Client Admin	HIUP Client	25/1/2019	2020-04-06 19:39:49	View
Dinesh Learner	HIUP Client	13/5/2019	2020-04-07 14:14:59	View
HiUP Learner	HIUP Client	30/1/2019	2020-04-07 20:10:07	View

1

This reporting dashboard is similar to the active learner dashboard, if you would like a recap please [click the link](#) to see how the filtering and login information works.

Messaging service

Using the inbuilt messaging service, Admins, Client Admins, Learners and Assessors can communicate to each other via the message platform. The system allows private messages to be sent to individuals or groups to be created and messages sent through there.

OLIVE Home Learner Programme

Search all...

All DMs Groups

HiUP, new, hiup Learner 0 seconds ago

HiUP, new 1 minute ago

HiUP, HiUP 4 hours ago

Generic Learner5 7 months ago

Roby Mathew 10 months ago

HiUP, HiUP 07/04/2020

HiUP Learner: I am unable to save 1.1 of knowledge 20:03

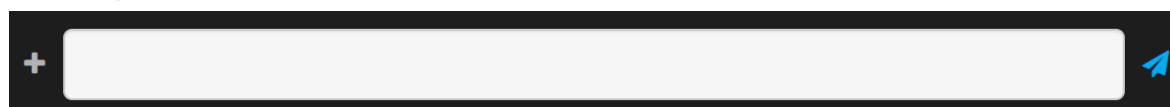
HiUP Learner: knowledge* 20:03

HiUP Assessor: let me check 20:04

HiUP Assessor: Thank you for your message 20:04

Manage Participants Remove Room

Sending Files

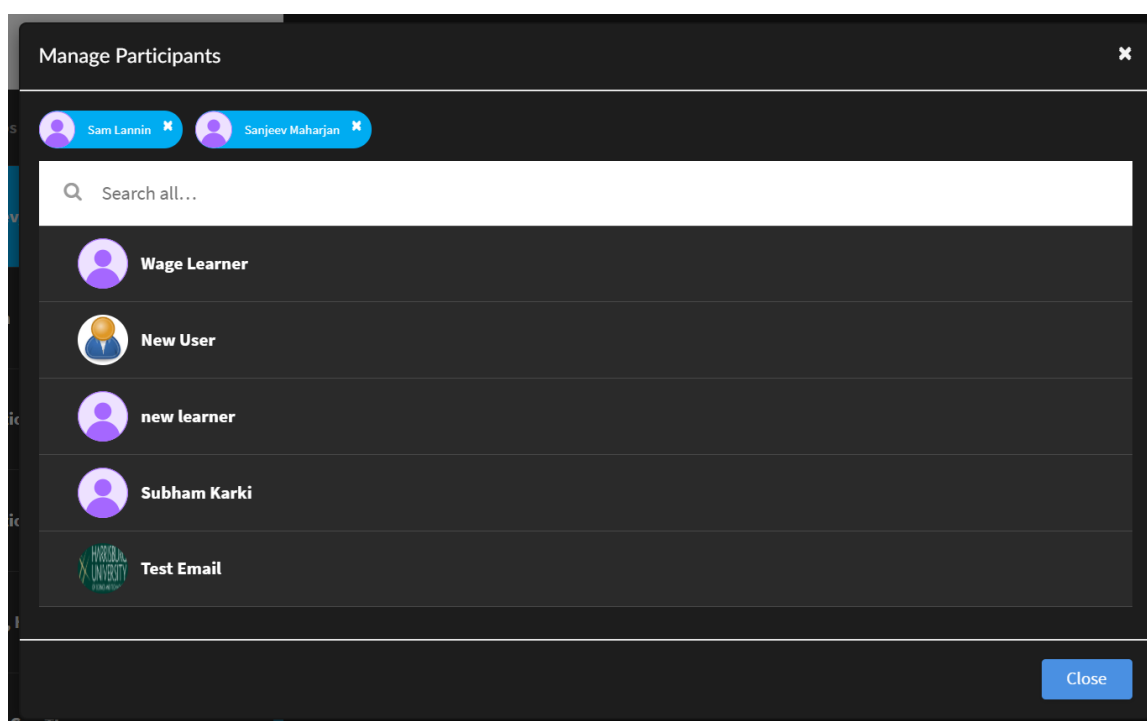
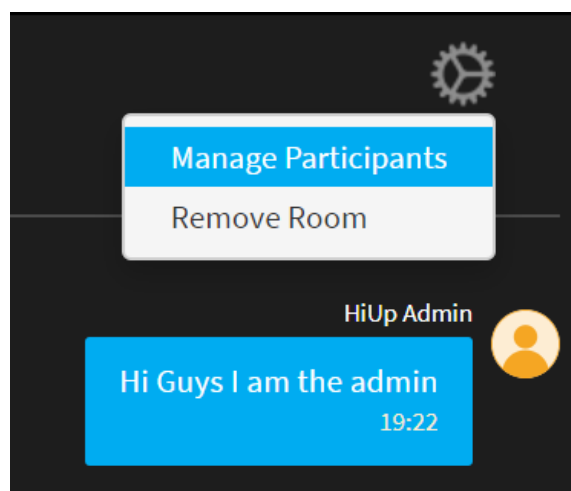


By Clicking the "+" icon beside the chat bar files can be added to be sent in the chat.

More Options

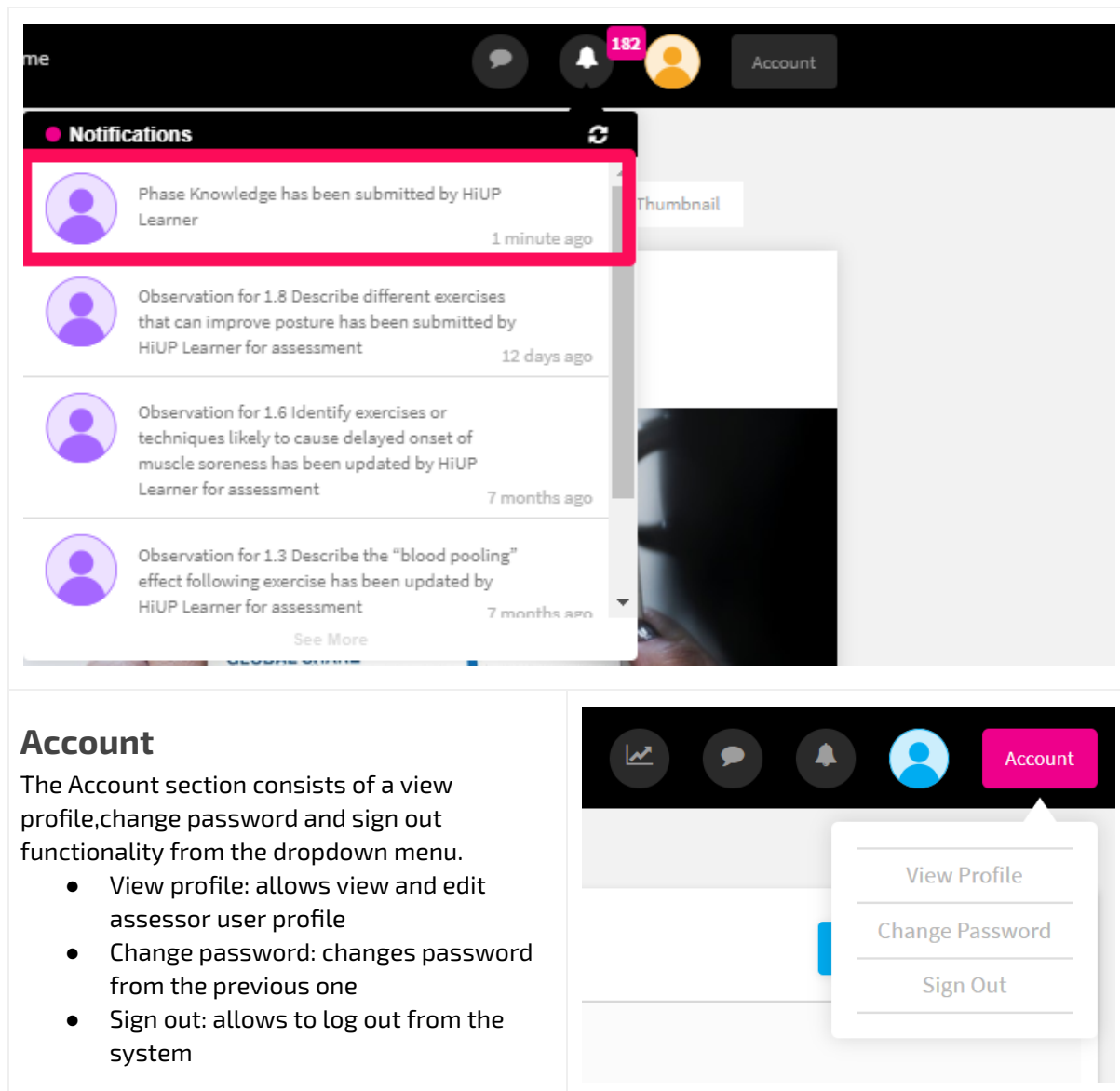
By Clicking the Gear Icon on the top right of the messaging system you can manage the participants of the room, adding and removing them from the room as shown below.

Remove Room, will permanently delete the room from the conversation list.



Notifications

When you get a notification it comes up in the notification section, these include notifications when a student has submitted responses, or the assessor has reviewed and approved the response etc.



View Profile

This will give you a snapshot of your account as shown on the right. Your Photo, Organisation, Email Address, Public ID, Address and when your account was added on the system.

To Edit your profile you can click on the **"Edit profile"** link in the View Profile section and this will take you to the Profile Editing Page as shown below.

Close



Name

Olive Admin

Client

hiup

Email

hiupadmin@olivemedia.co

Public ID

0D9C18

[Hide Information](#)
[Edit Profile](#)

Information

Address

Onboarded

25 January 2019

OLIVE
Home
Client
Learner
Programme
Journey Worker Rate

Account

Edit Profile

FIRST NAME

Olive

LAST NAME

Admin

EMAIL

oliveadmin@olivemedia.co

GENDER

☒ Male
 ☐ Female

DATE OF BIRTH

2019-12-02

ADDRESS

MOBILE

Select

1234567890

NATIONALITY

British

DISABILITY

☐ Yes
 ☒ No

EMPLOYMENT

Full Time

FURTHER NOTES

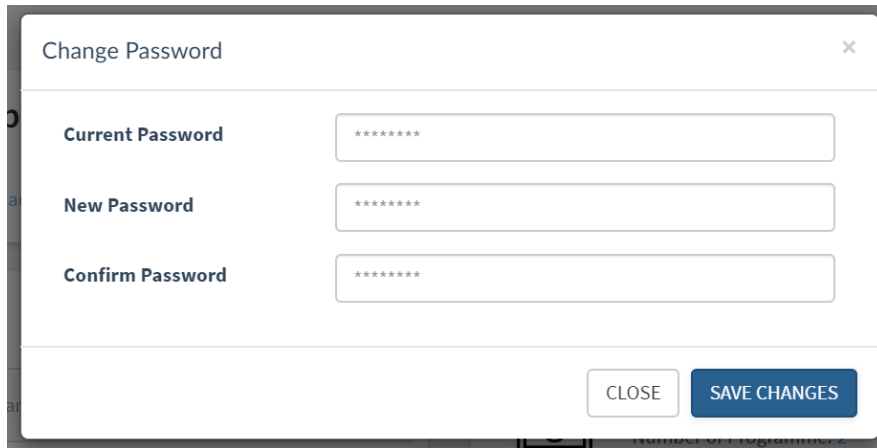
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent in eros ex. Curabitur non est condimentum, ultrices lacus nec, tempus lectus. Sed purus ligula, mattis at tincidunt a, rutrum eu nunc. Aenean porttitor magna nec libero maximus, id facilisis elit sodales. Nullam pulvinar sit amet dui a

CANCEL

SAVE

Changing Password

To change your password you can click the "Change Password" link under the Account section and this will bring the Change Password screen as shown below. Here you can enter your Current Password and the New Password.



A modal dialog box titled "Change Password" with a close button (X) in the top right corner. It contains three input fields: "Current Password", "New Password", and "Confirm Password", each with a masked password (*****). At the bottom right, there are two buttons: "CLOSE" and "SAVE CHANGES".



Password Policy

When creating your password is best to have a password that is,

- ★ Minimum 6 characters long
- ★ One Uppercase, One Lowercase, One number and One Special Character
- ★ If there is a security breach please let you administrator know as soon as possible.

Signing out

To go back to the login page, you can sign out from the system by clicking on Account > Sign Out as shown on the right side.

