OLIVE

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.

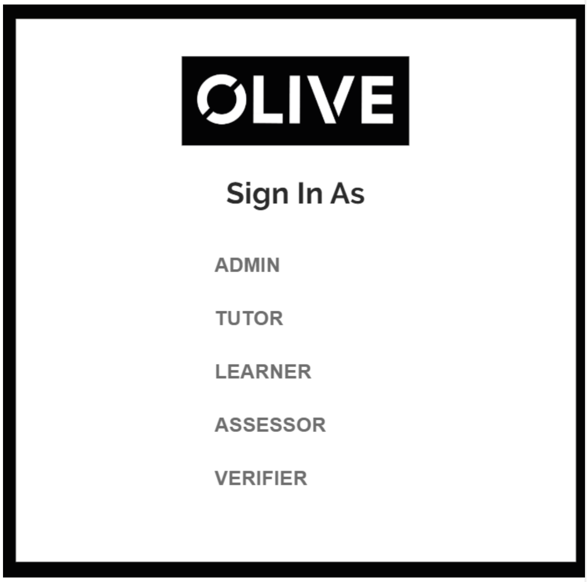
Support and contact details

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

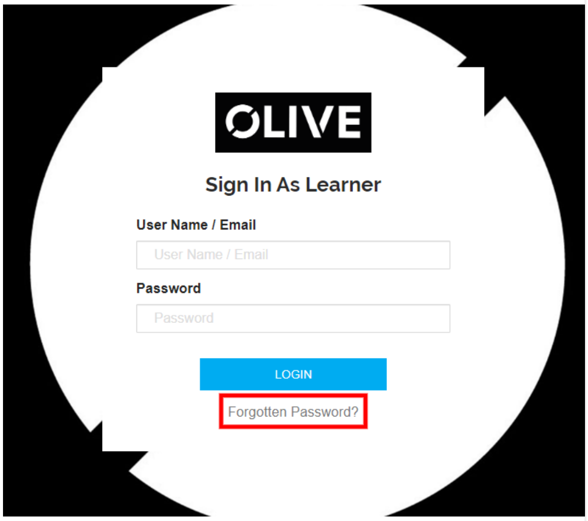
Clicking on the Login Link, you will be taken to the Login page. Login link looks like https://(Your Org_domain).connectedportfolio.com
From here you can select the user type that has been assigned to you.



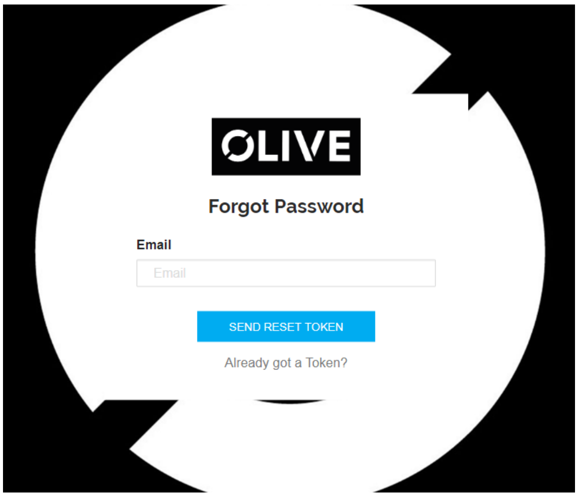
Once you have clicked on the relevant usertype you will be taken to the screen where you can enter your username and password.

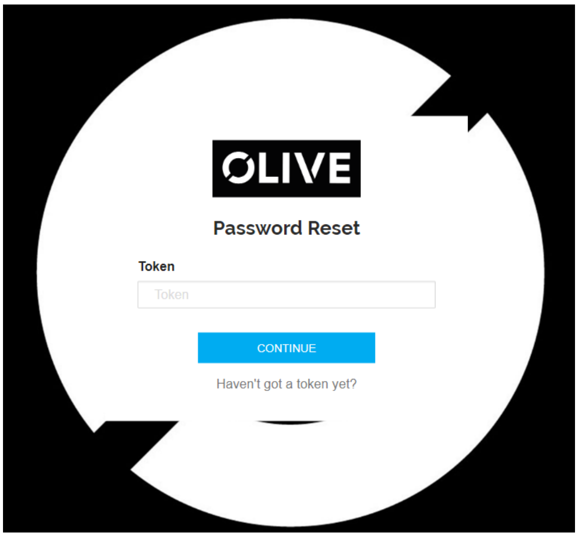
Forgot Password

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



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



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

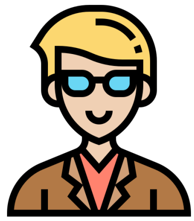
These are delegated admins of the client who are responsible for creating the learners, assigning them the proper course and work hours and details.

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

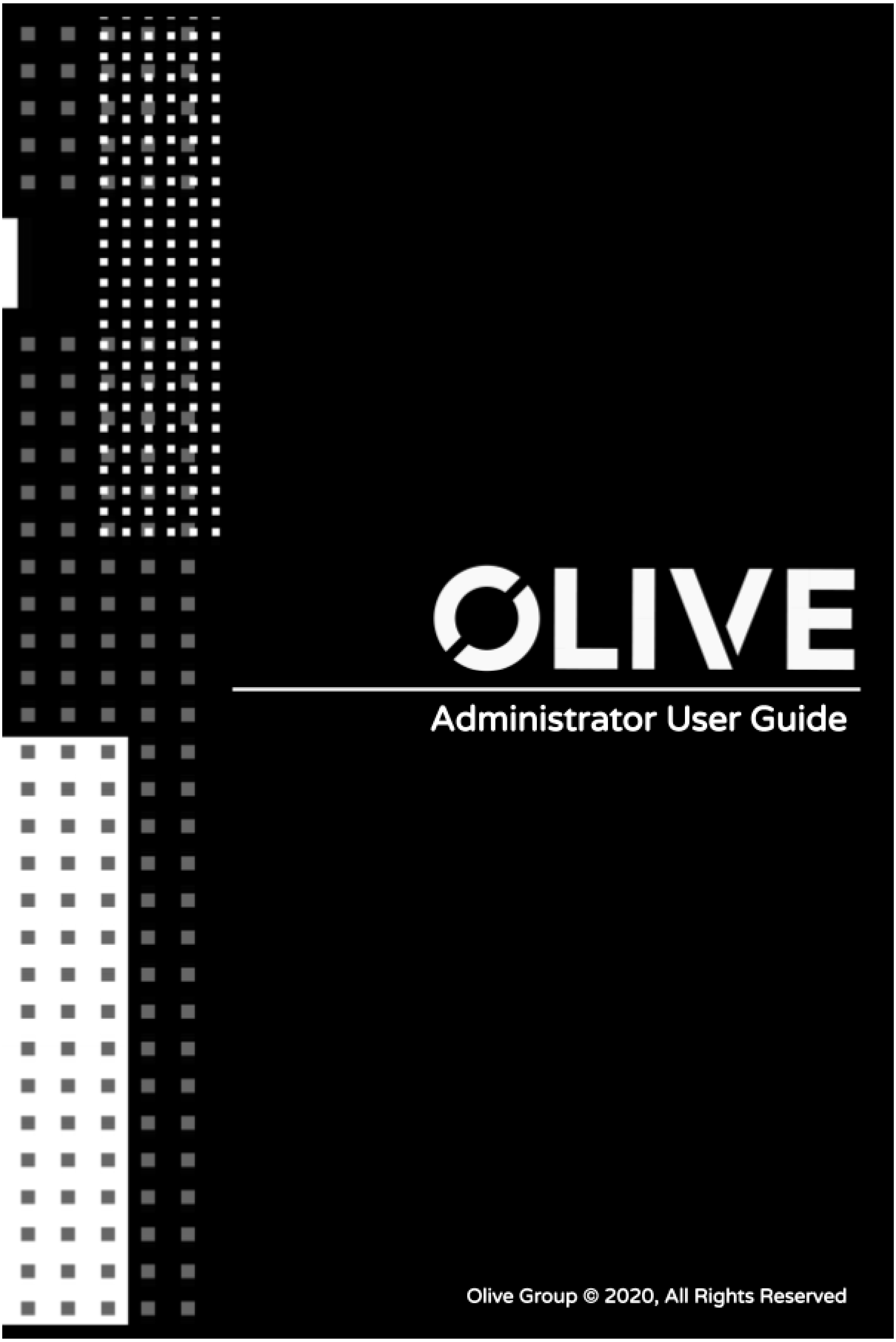
Tutors

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.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Administrator User Guide
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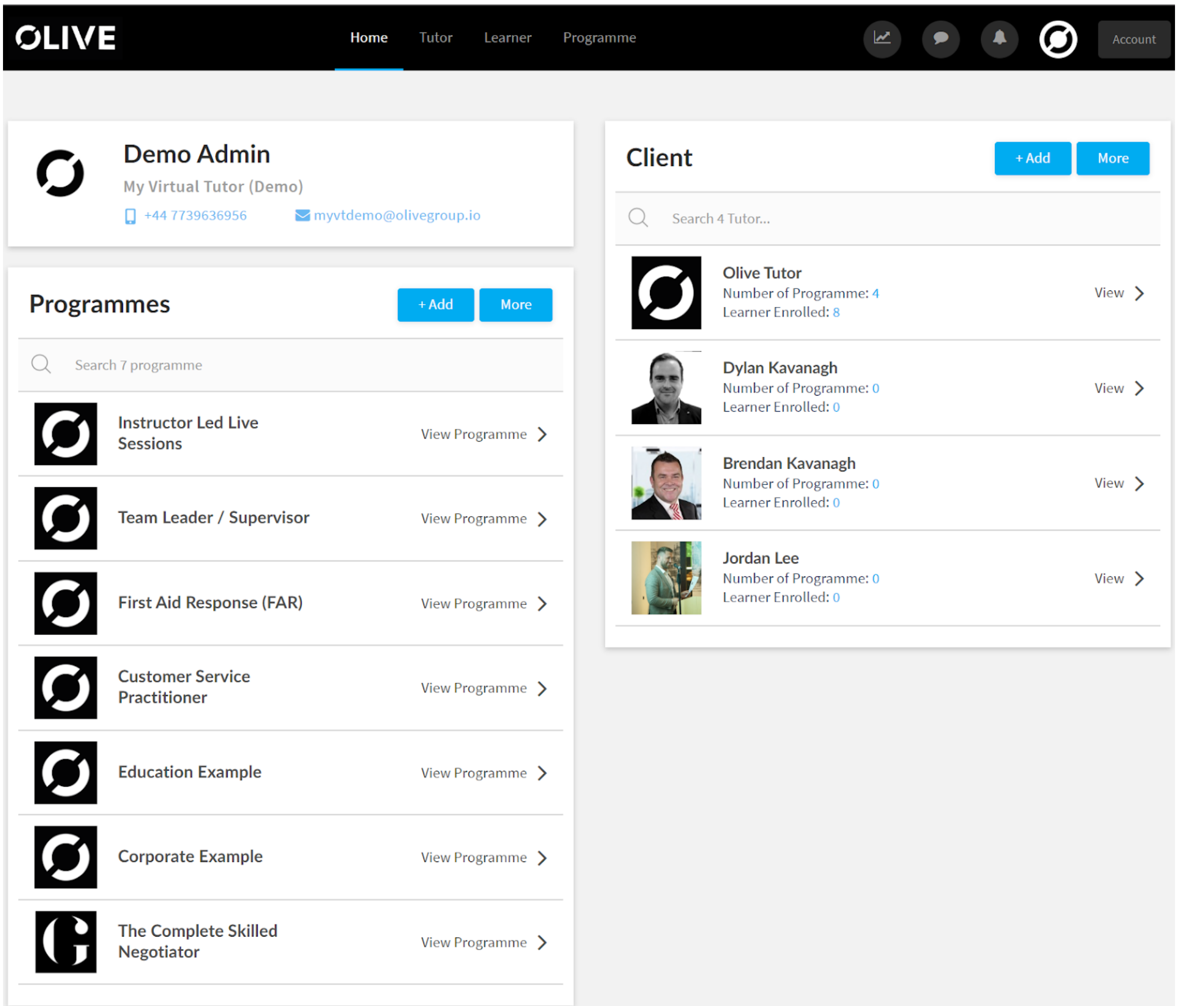
Administrators

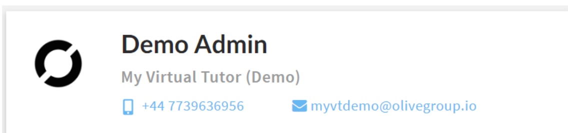
Dashboard/Homepage

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



Account Information

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



Programmes

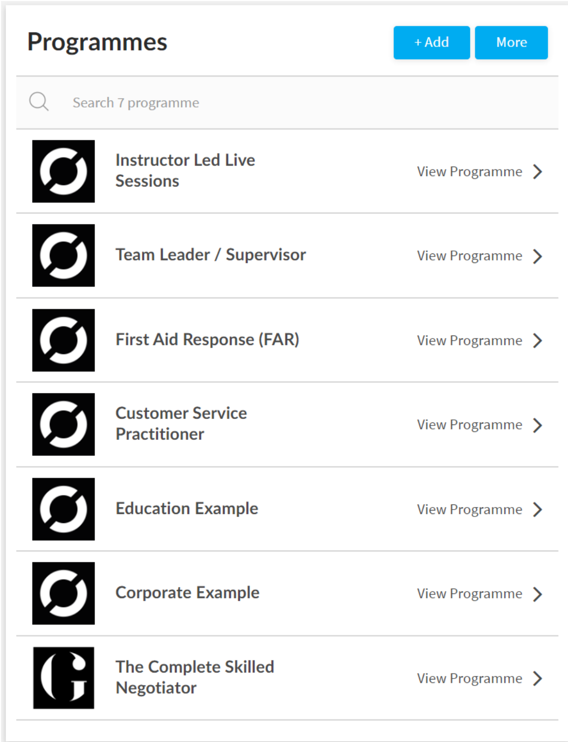
The Programmes section gives you a list of all the Programmes that have been currently created in the system.

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



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

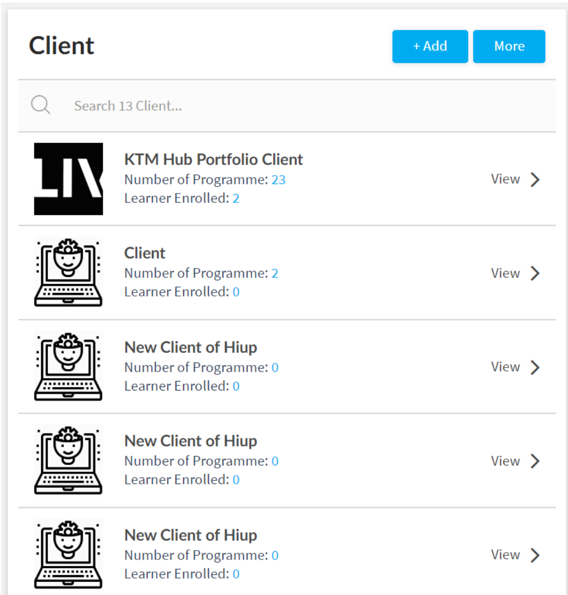
Clients

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.

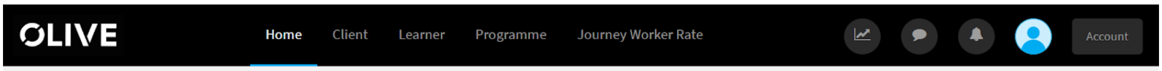
Click on "**More**" to see the full list of clients that have been created on the system.

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



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.

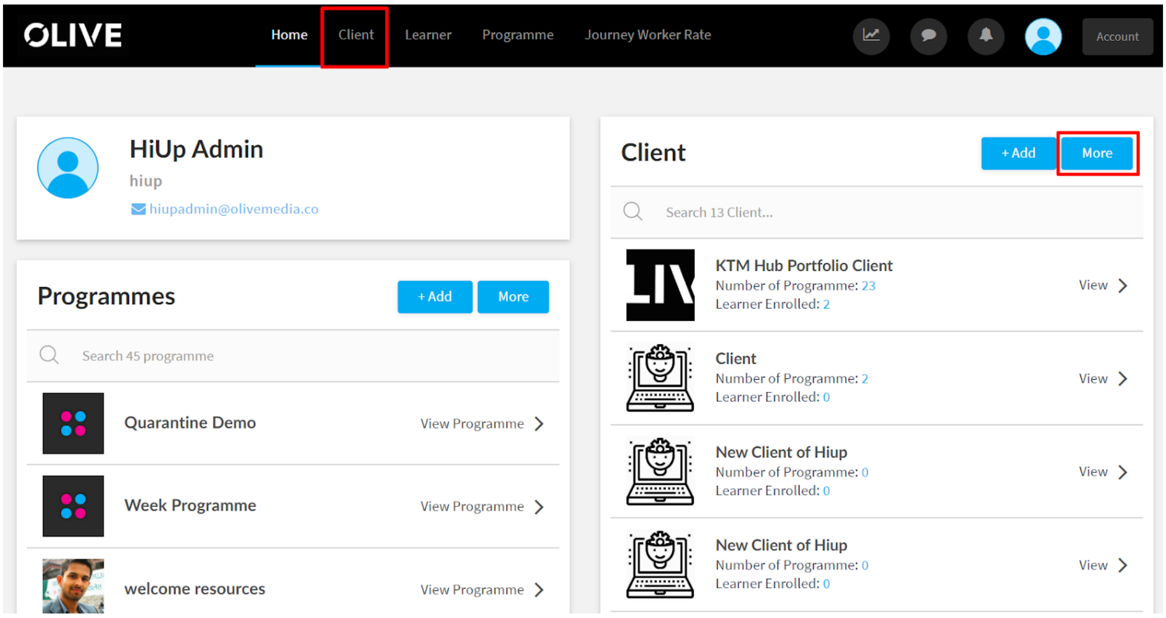
Navigation Banner



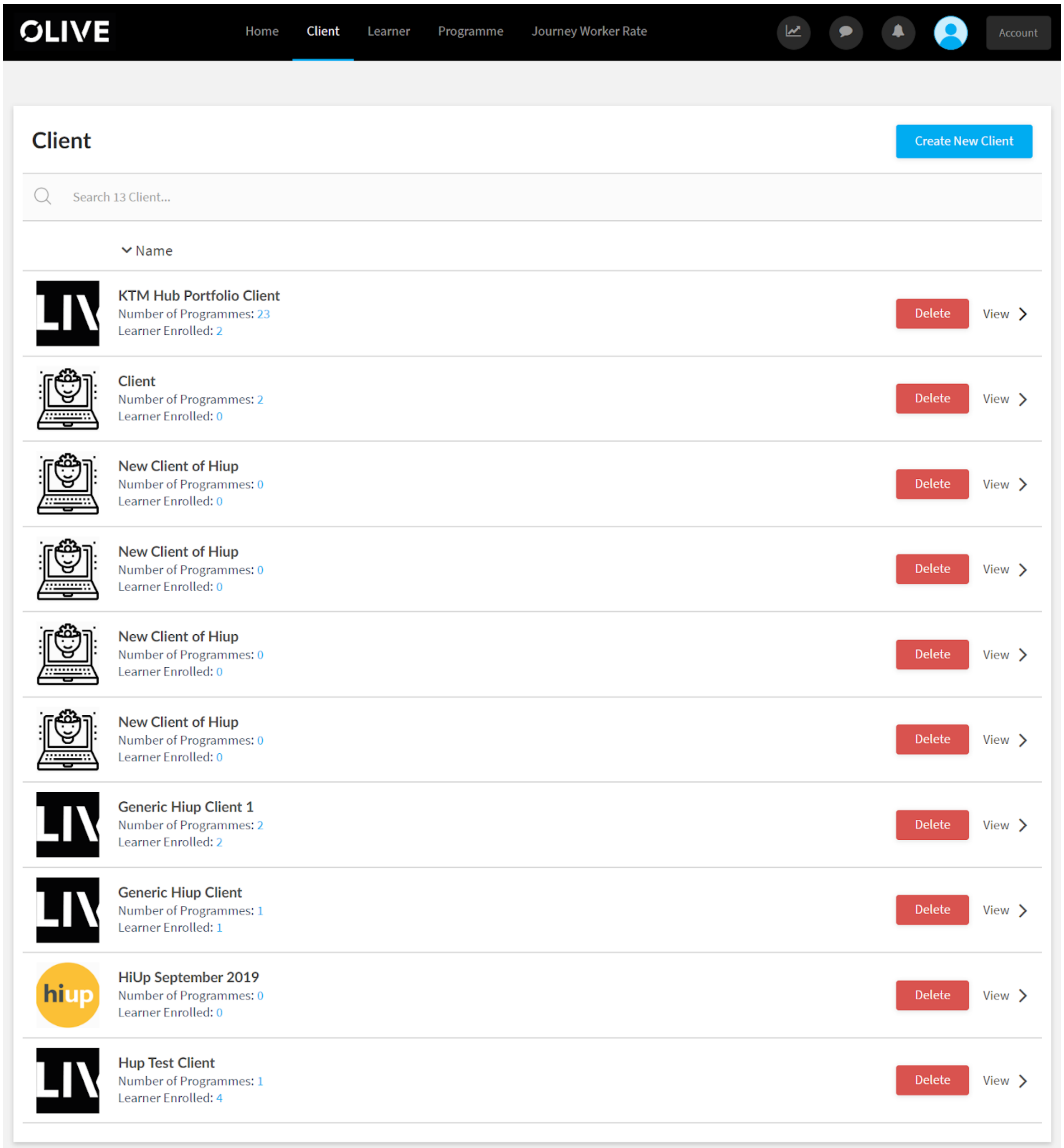
The Navigation bar takes you to various pages within the system. Clicking on “Home” will take you to the home page, you can also Navigate to the homepage by clicking the company logo on the Top Left Corner.

Client Section

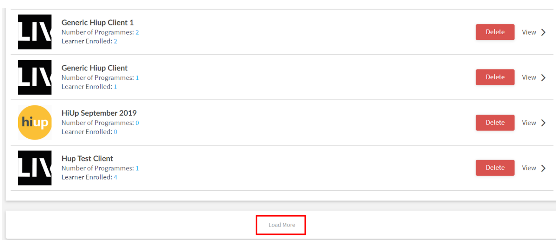
There are two ways to reach the client page, this can be done by clicking on the Clients Tab in the Navigation Banner or by Clicking More in the Client Section of the Homepage.



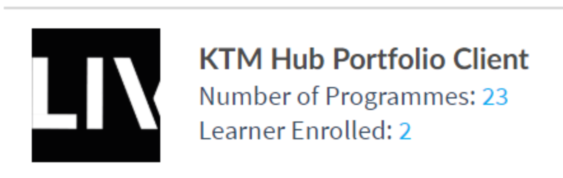
Below is an example of the client section,



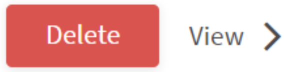
You can load more clients by clicking on the "**Load More**" button at the bottom of the page.



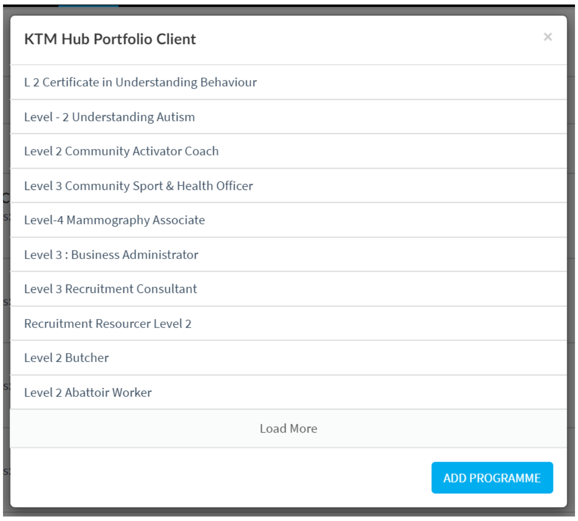
You can know about the number of programmes assigned to the client and the number of learners by looking at the details beside each client.



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



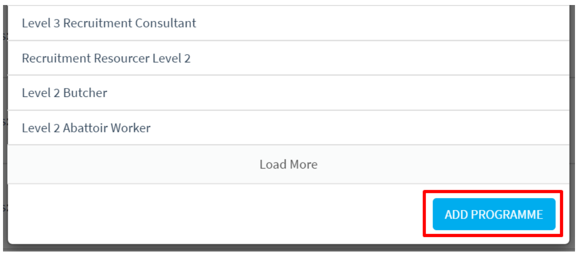
To View all the programmes that have been assigned to a client you can click on "**View**". To view more assigned programmes you can click on "**Load More**"



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.

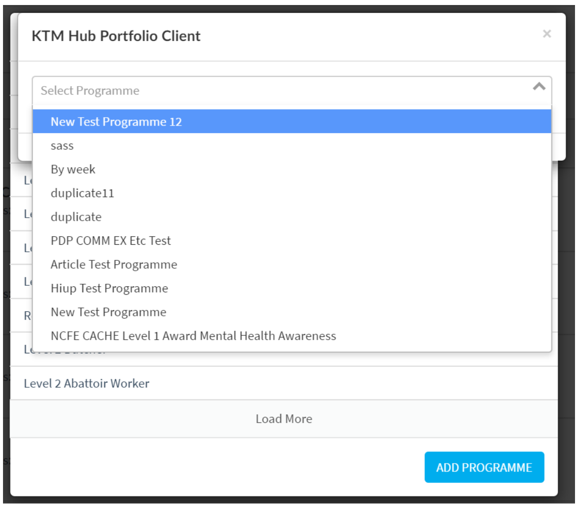
To View all the programmes that have been assigned to a client you can click on "**View**". To view more assigned programmes you can click on "**Load More**"



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

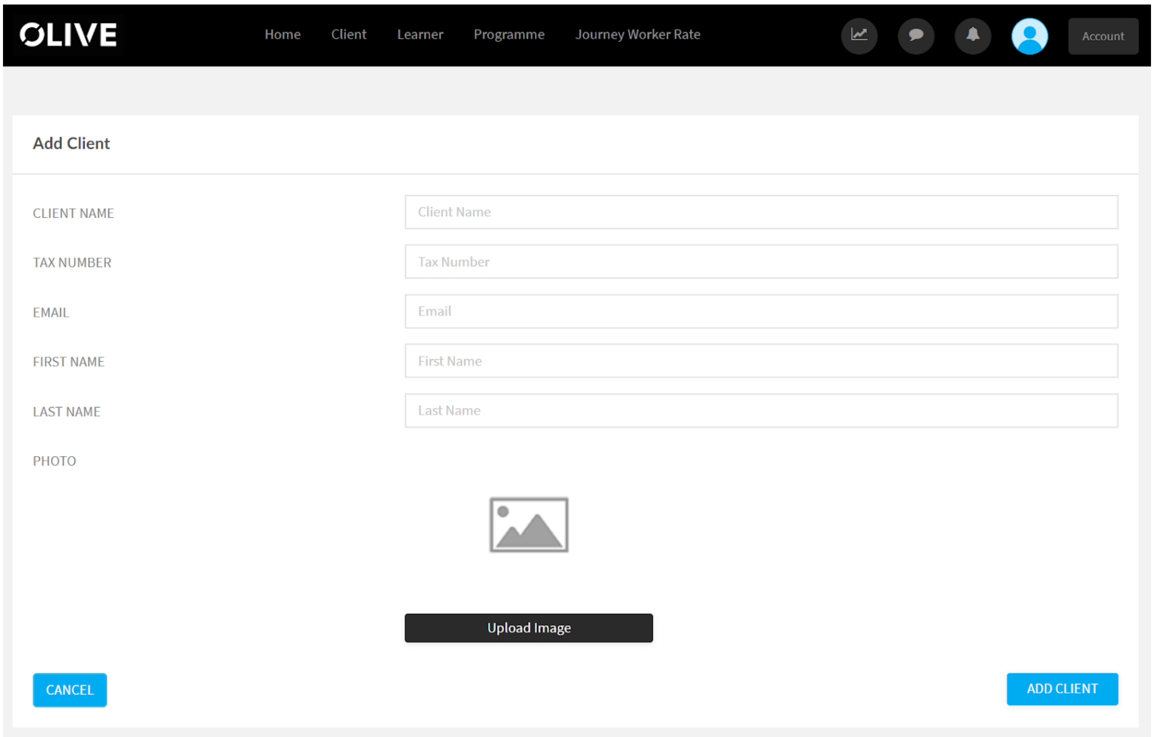
Once you have found the programme you can click on "**Add Programme**" and this will add the programme to the particular client.

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.



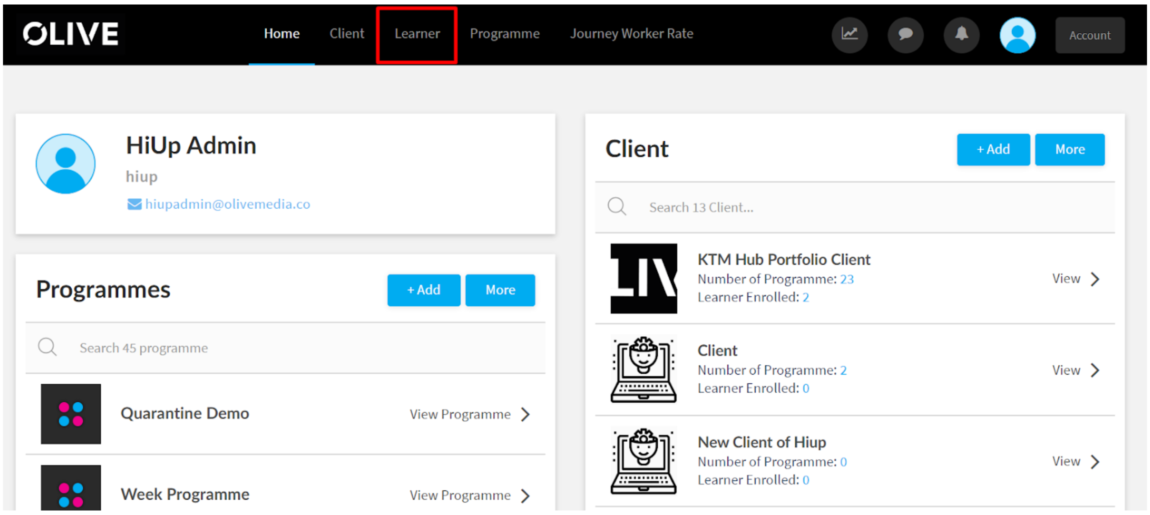
Here you can add the necessary information like the **Client Name, Tax Number, Email address of the Admin of the Client Organisation, First Name of the Admin, Last Name of the Admin and Photo.**

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

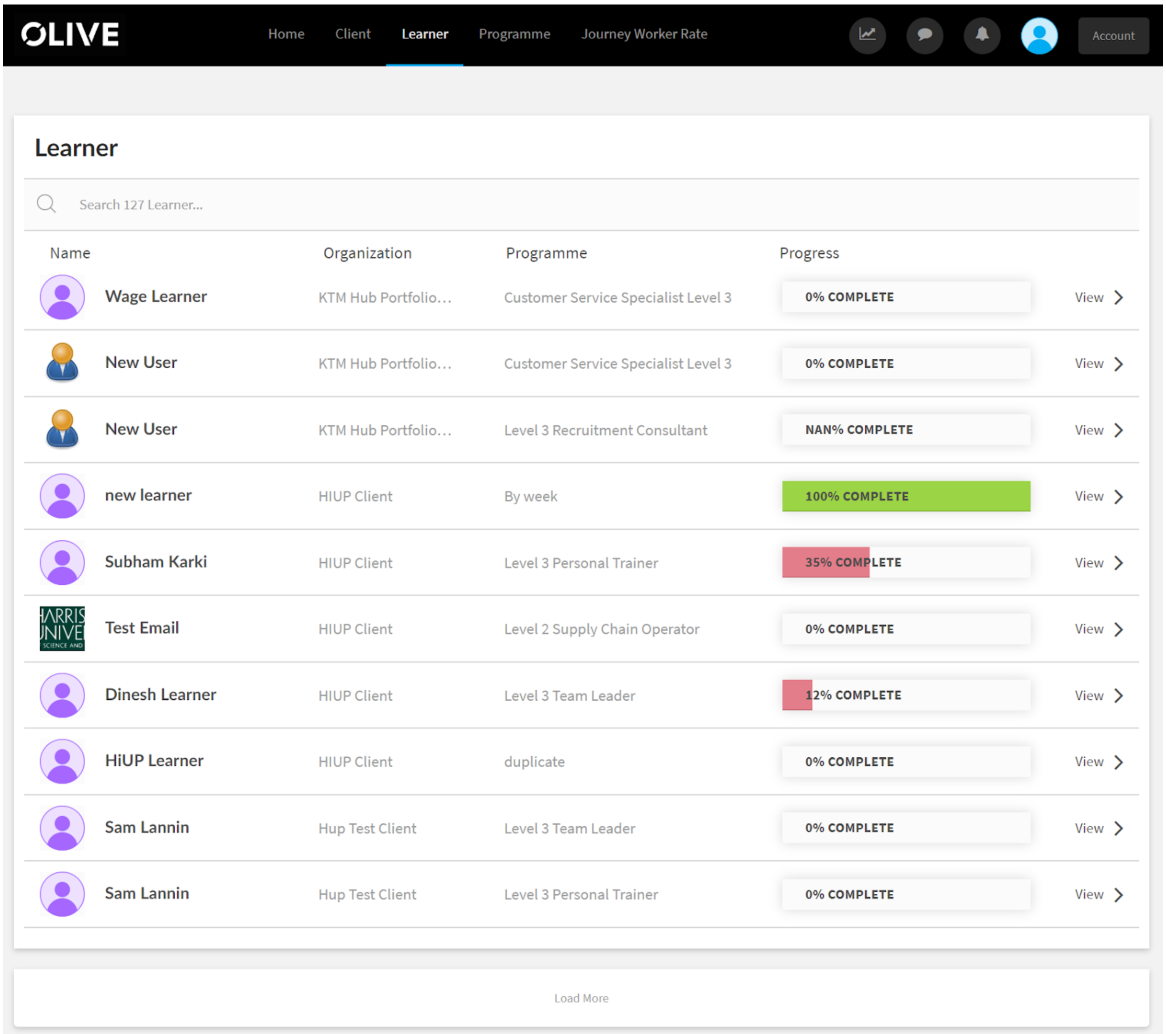
To Note: Once this process has been completed, a registration email will be sent to the new Client Admin to create his **username and password** and log into the system.

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.

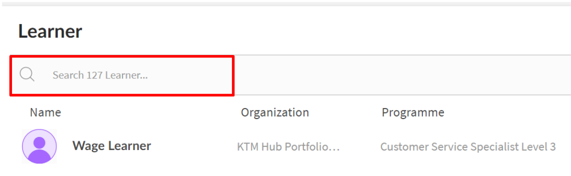


Following is an example of the Learner Section from the Administrator view of the system.

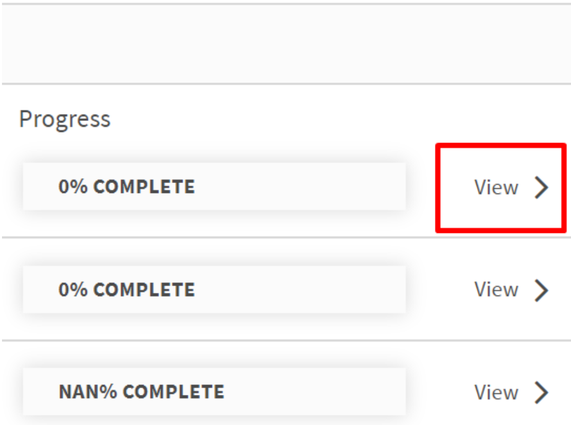


This page shows the learners from all the clients under the organisation, with what programme they are doing and the progress in the programme.

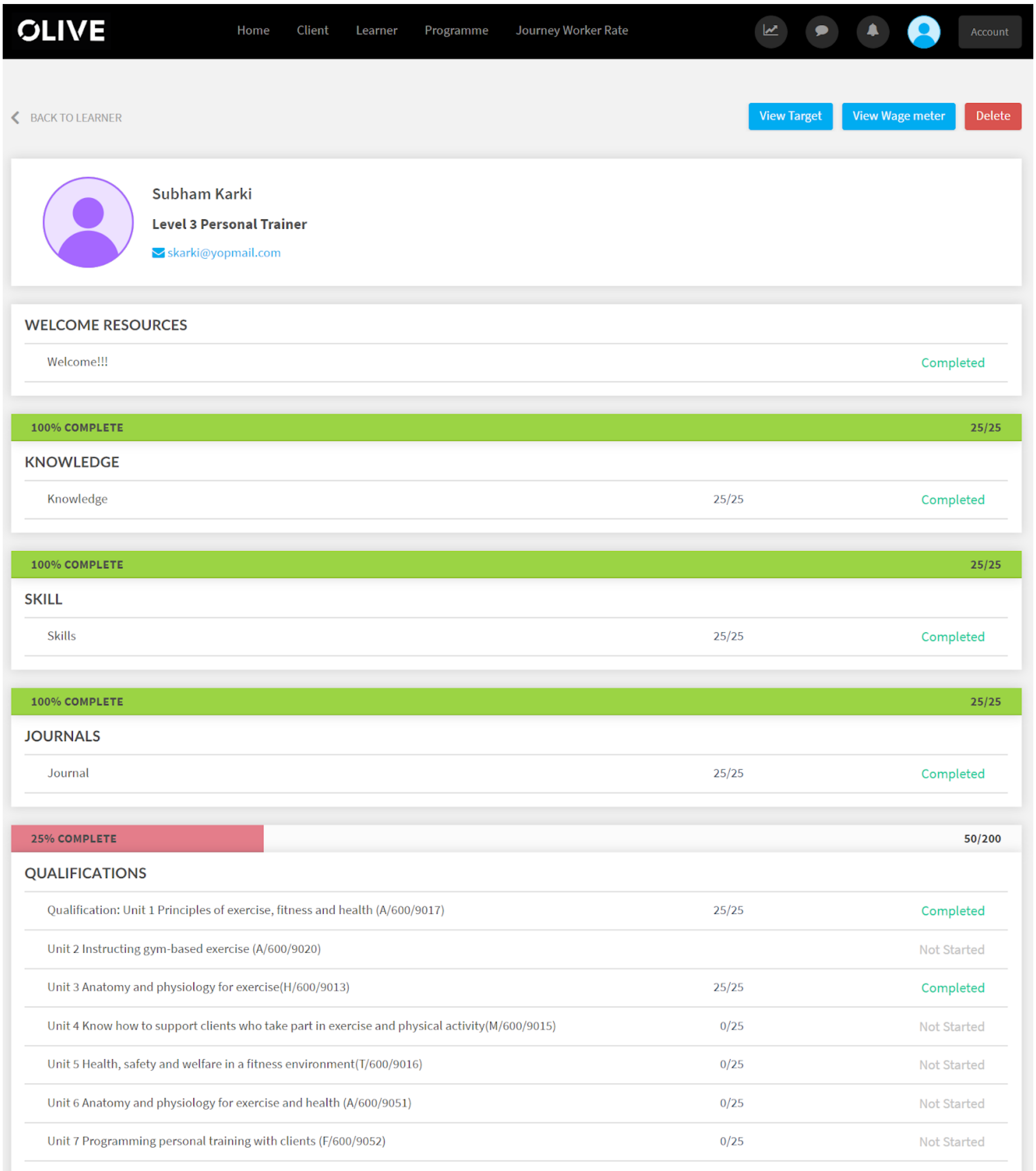
To Search for a learner you can use the search bar and search for the name of the particular learner.



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

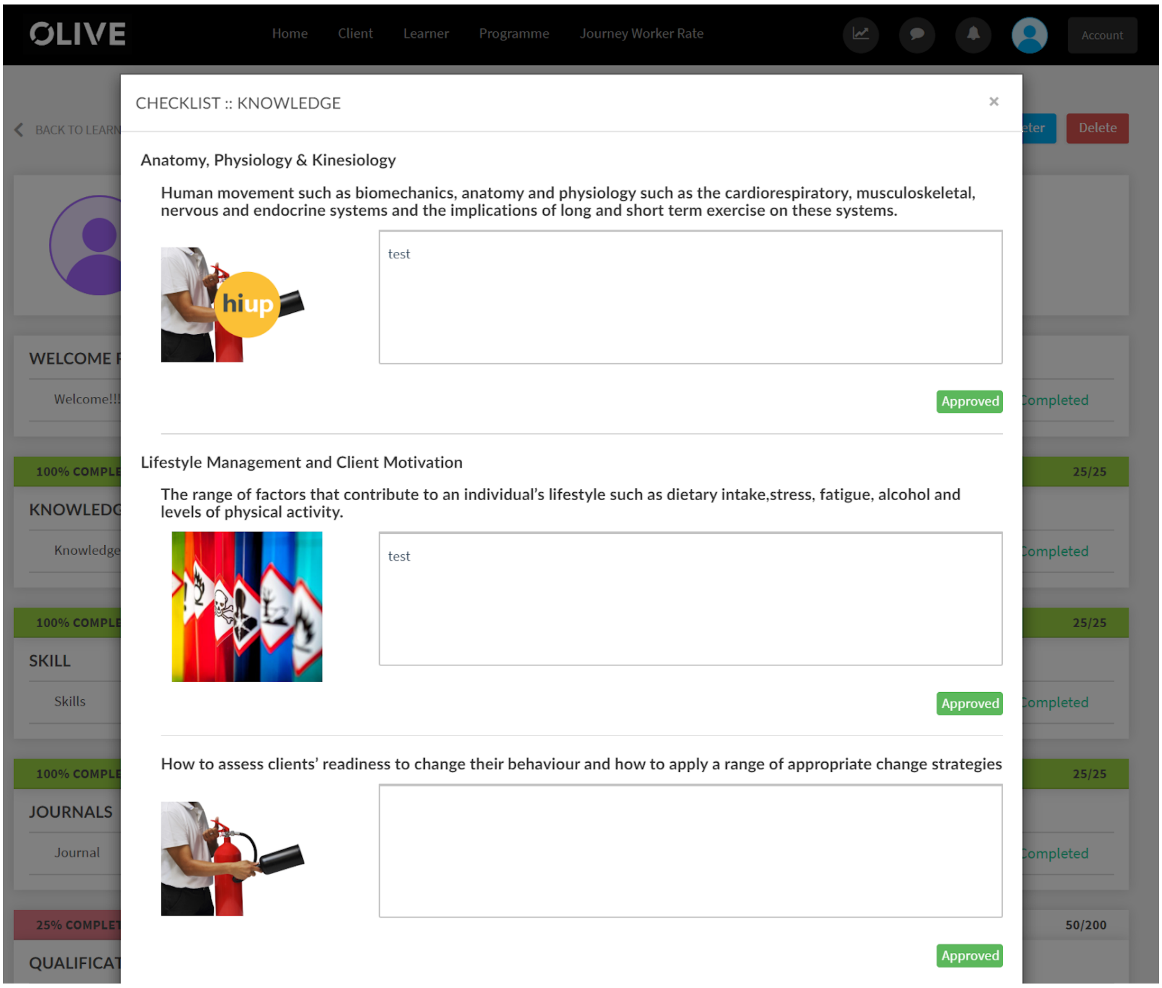


Below is an example of the Course Progression Page,



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.

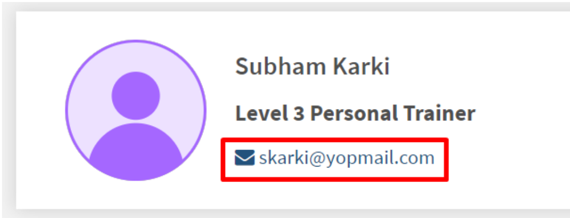
An Example has been shown below,



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

Mailing Students

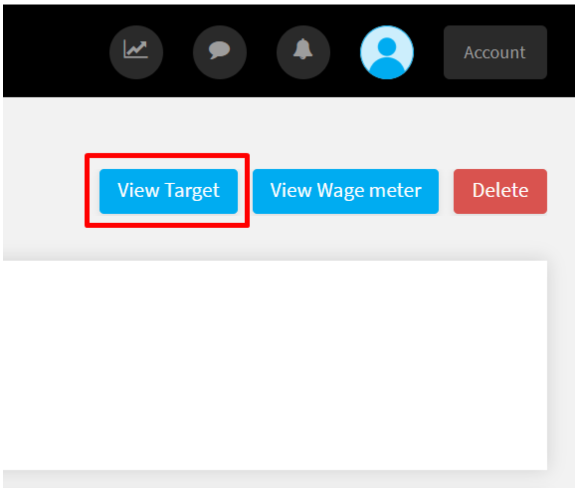
To mail a student you can click on the email link in under the students name and this will prompt you to choose your mailing software.

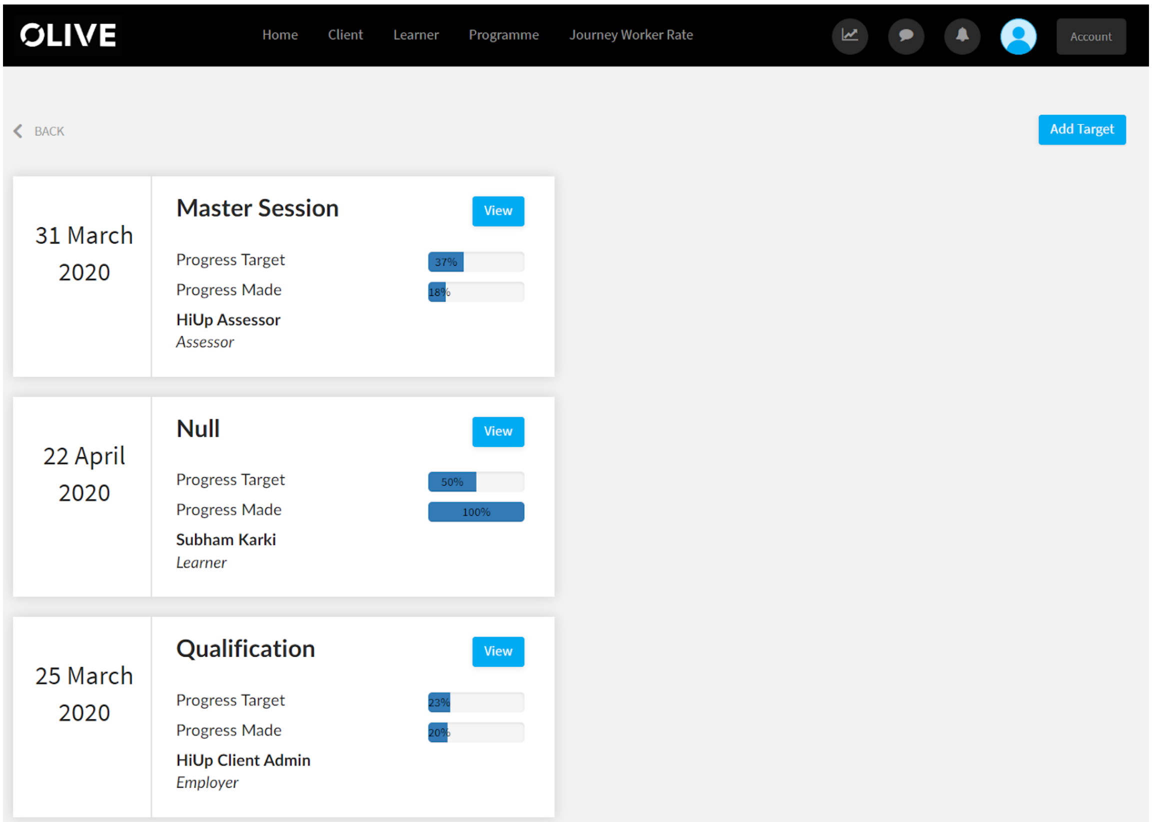


Viewing Targets

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.

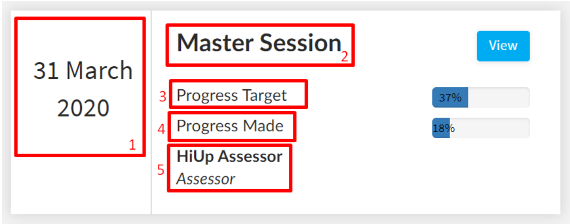




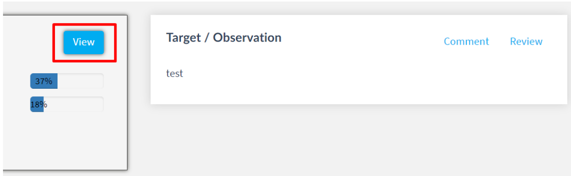
This page provides you with the list of Targets that has been set.

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

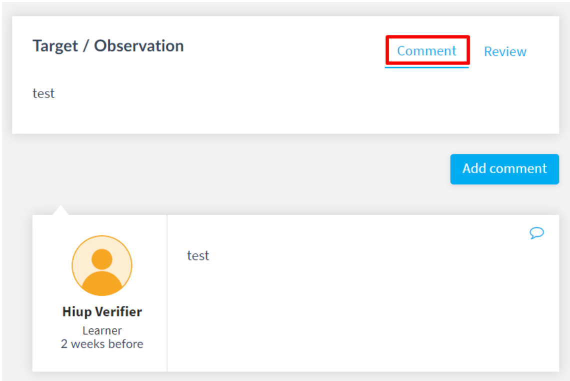


By Clicking on "**view**" beside each Target you will be able to see the comments and review section of each Target.



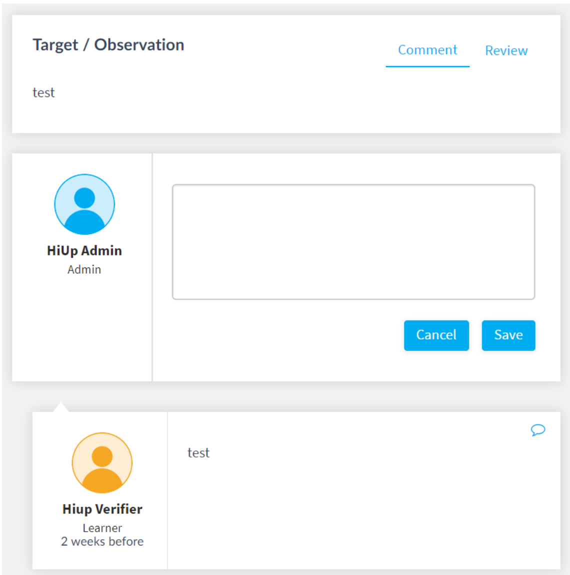
Targets - Comments

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



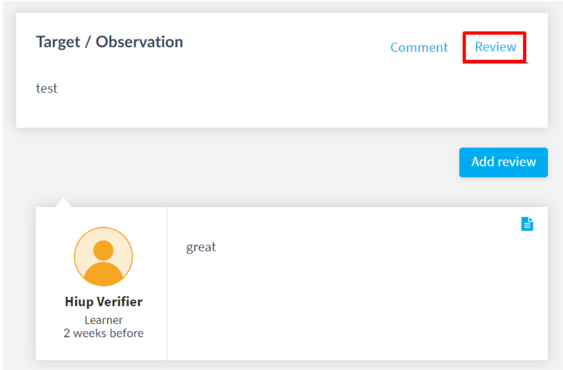
The "**Add Comment**" button will let you add comments into the particular Target.

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



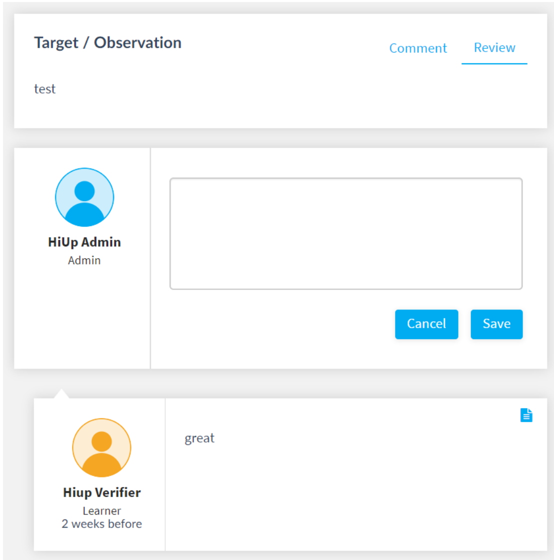
Targets - Review

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.



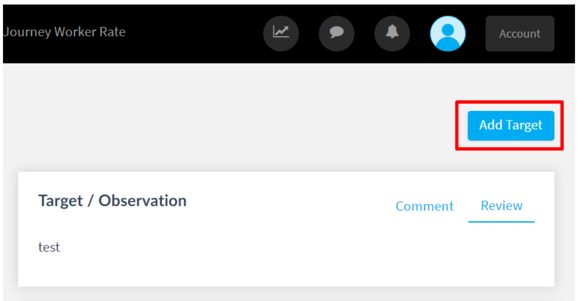
The “**Add Review**” button will let you add the review into the particular Target.

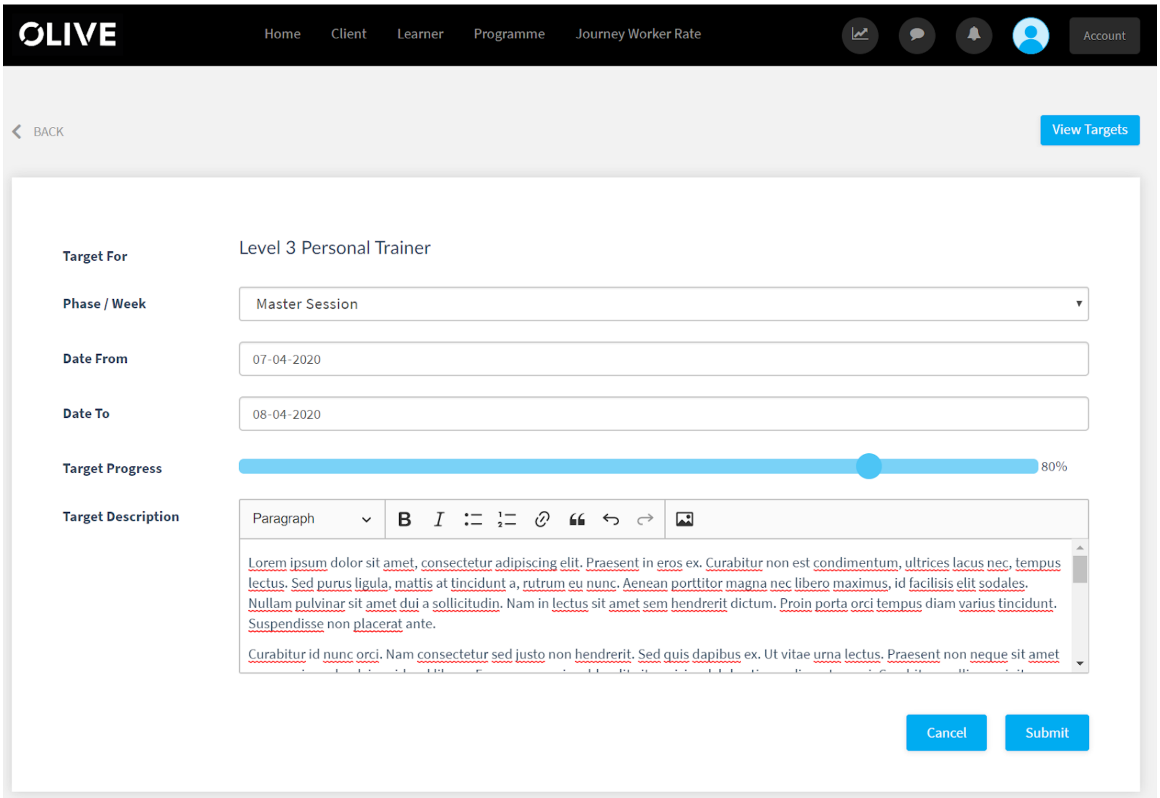
To cancel the changes you can click on “**Cancel**” or to save you can click on “**Save**”



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,





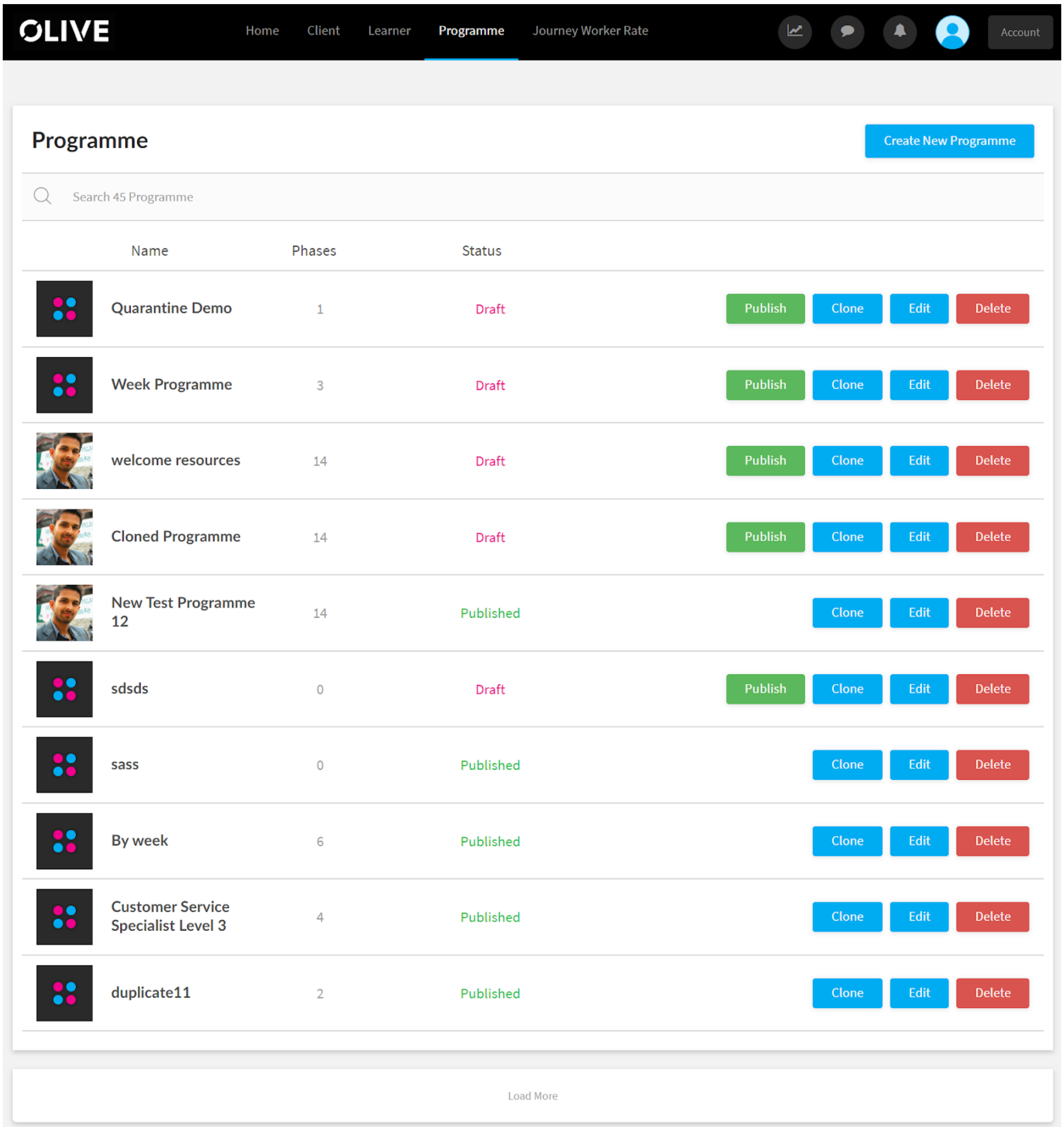
Here you can set the **Phase or Week** of the section the target is assigned to, the **starting and ending date of completion** of set target, the **required progress** and a **description of the target.**

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.

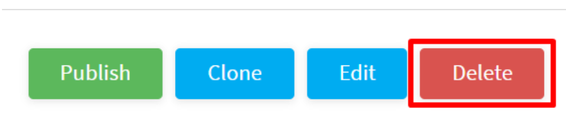
This will bring you to the Programmes section which shows all the programmes and you can create your own programmes from here. An example has been shown below.



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



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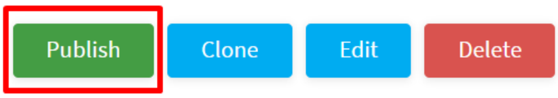
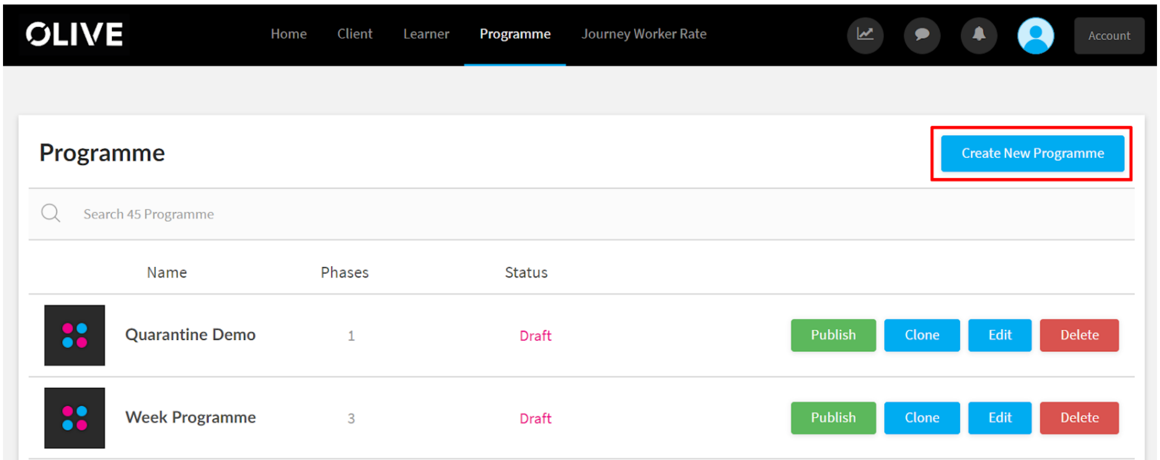
progress on that particular programme will be lost for all learners.	
To Edit an already existing programme you can click on the Edit button **To Note:** This is recommended only for draft programmes and not published programmes.	
Cloning a Programme	
To Clone an existing programme you can click on the “**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.	

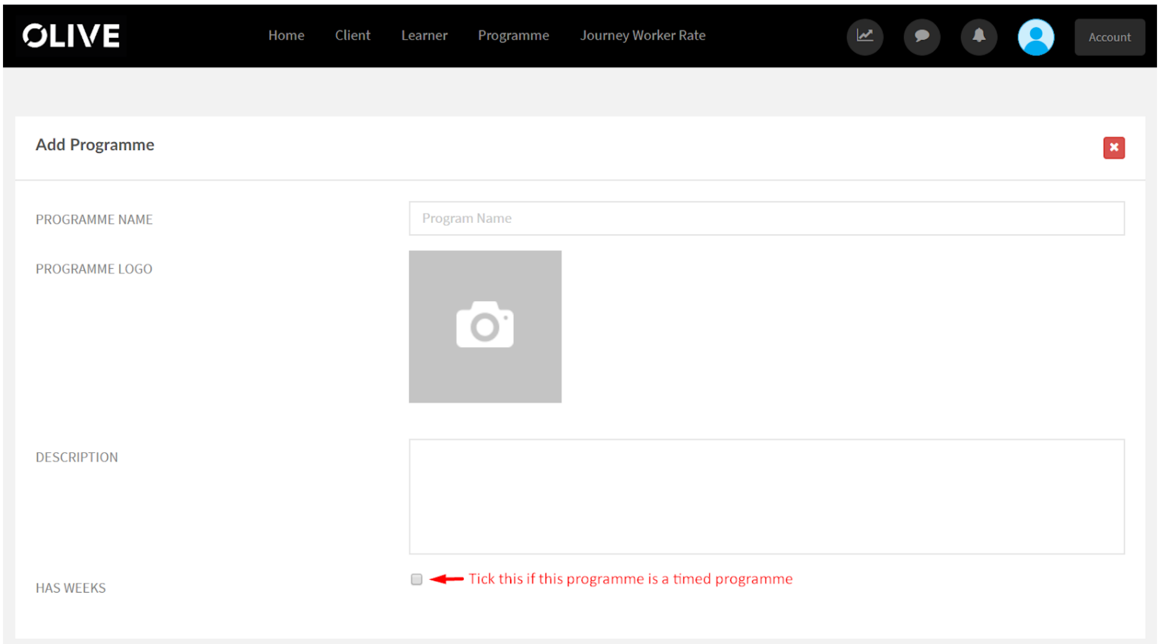
Creating a new Programme

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.



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.



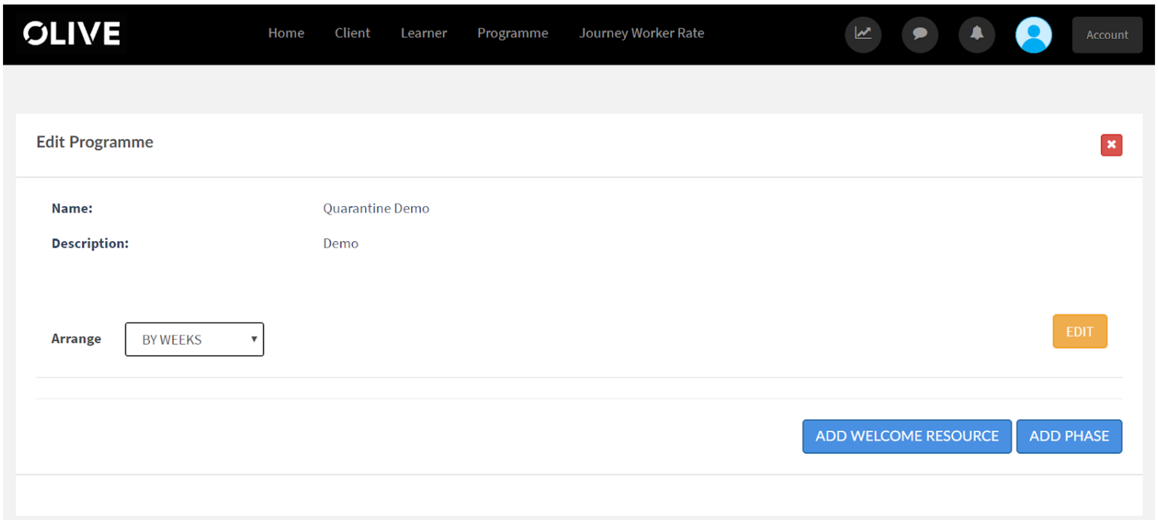
Difference between Timed and Standard Programmes

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

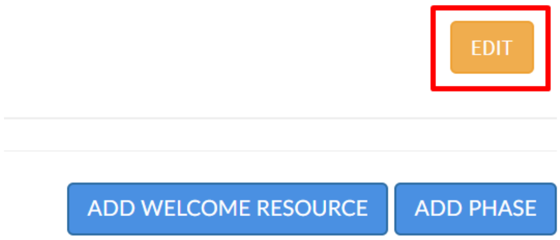
If you choose to set up a weekly programme you will be given the option to enter a week number at the top of each phase. This will segment the phase into the week that you have chosen.

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,



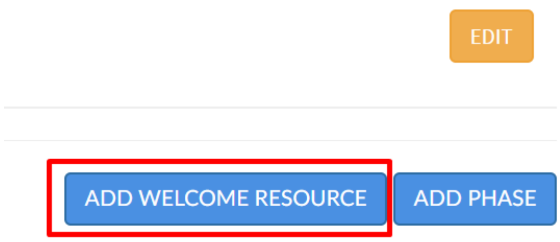
To Edit the initial information that was added you click on the “Edit” button, and this will take you to the initial page where you can change the necessary details.

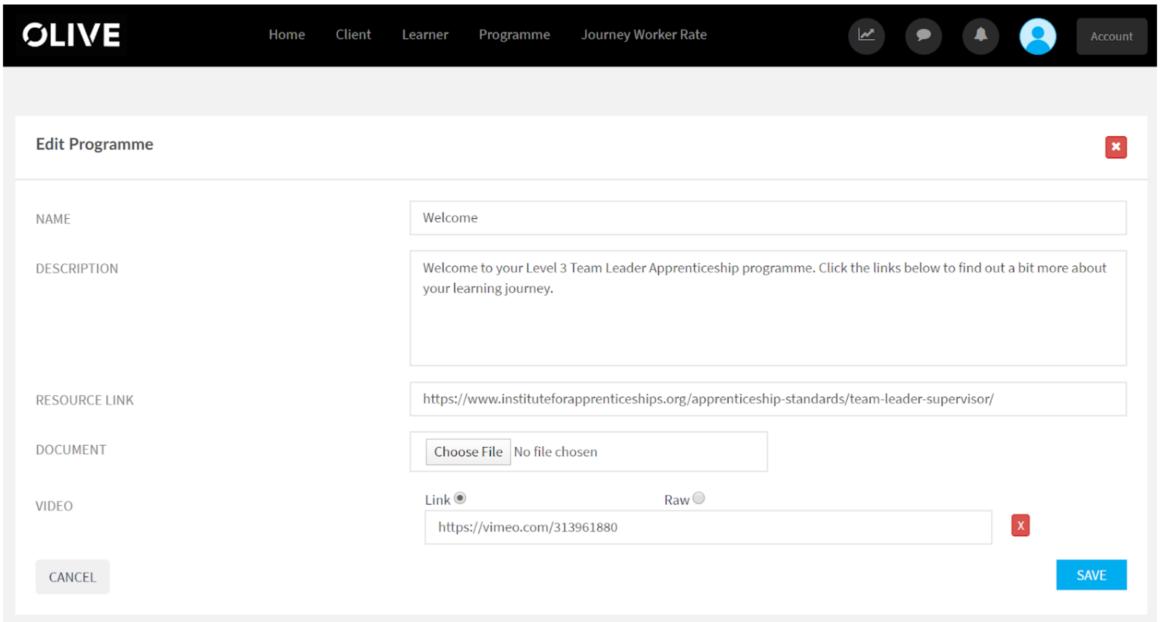


Welcome Resource

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,





Admin Edit View

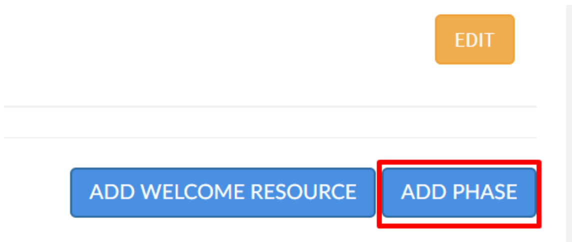
Here you can add the **Name** for the welcome resource, **description, link to the programme** in the company website for additional information, **add documents like company handbooks** and if you have a **video that can accompany the welcome resource** this can be either added as a link or as a raw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

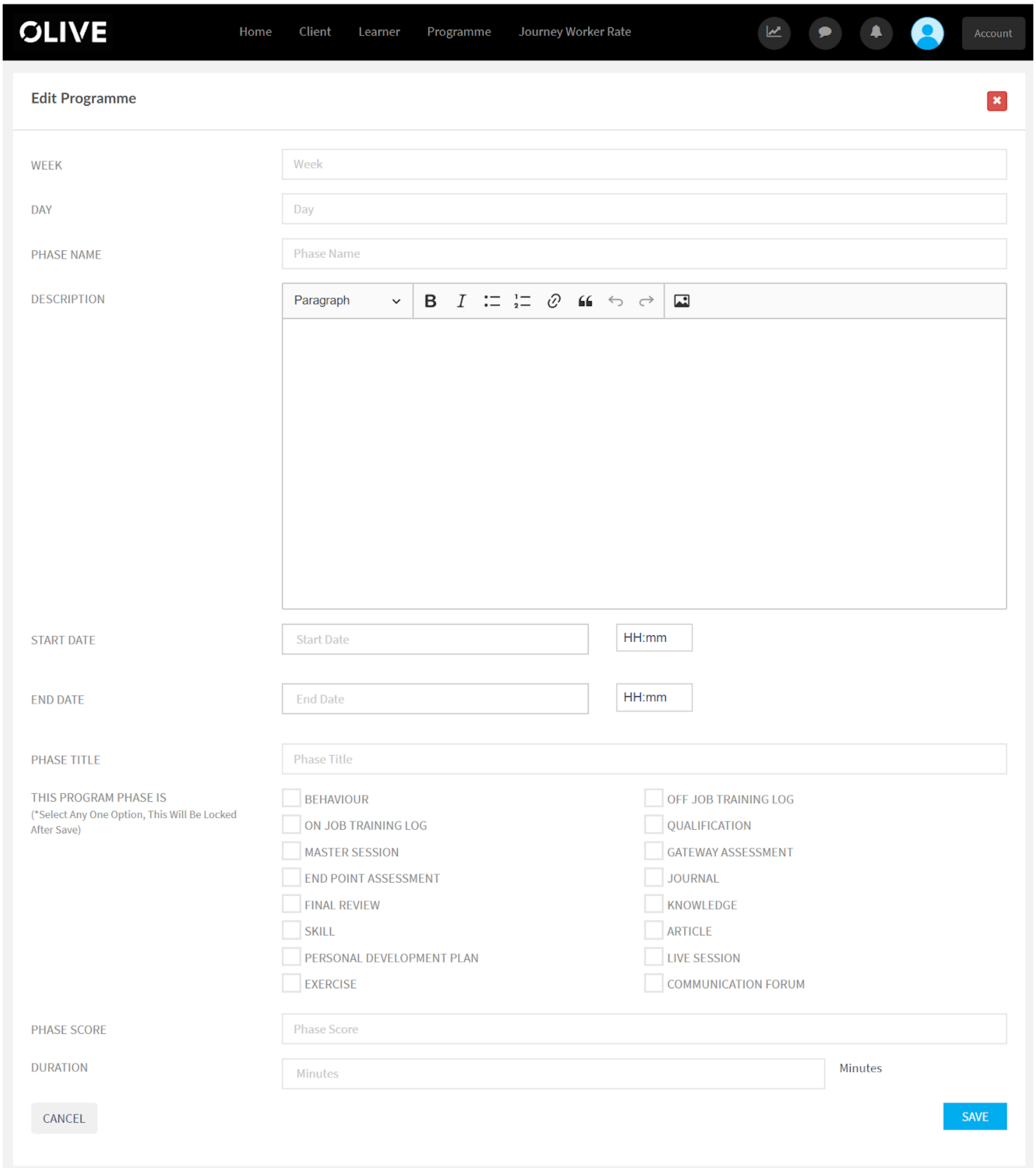
[Click here to see how this looks from a learner view]()

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.





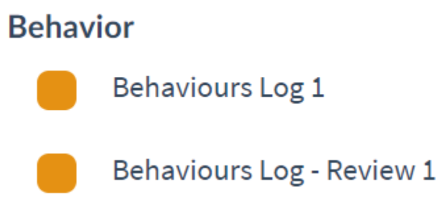
Week and Day

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.

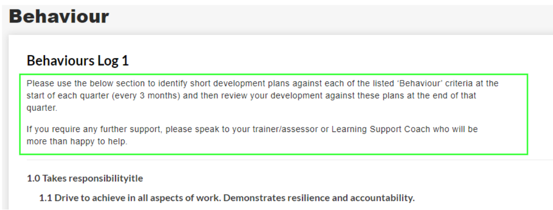
Phase Name

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.



Description

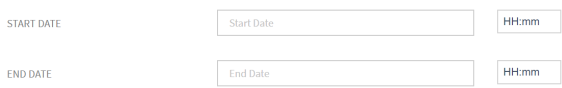
When a user clicks into a particular phase the phase description will be displayed at the top of this page. Please see below example:



Start and End Date

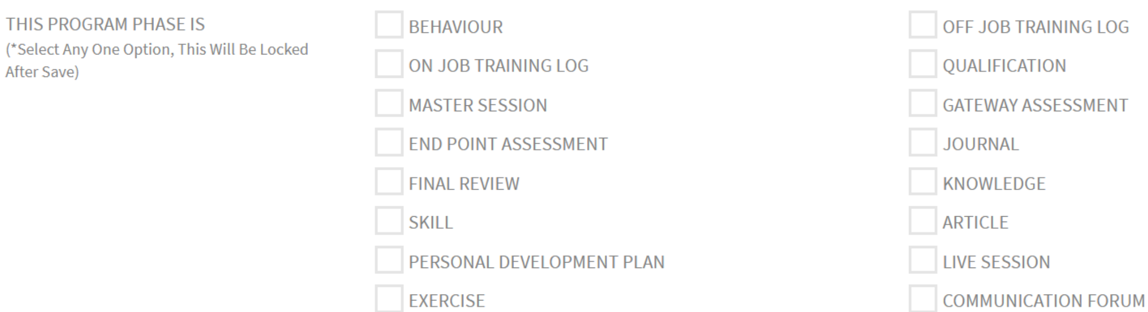
This particular feature is for if a programme has content to be released at specific times. For example if a learner is to have content released to them on a specific date and only for a particular period of time.

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.



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,



Phase Score

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

Duration

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

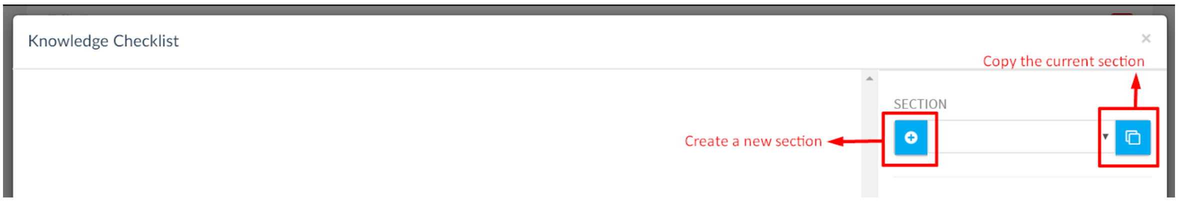
will be deducted from the learners off the job activity automatically. **To Note:** The time needs to be added in minutes.	
Once you are happy with the selection you have made you can click "**Save**" and this will add the Phase to the programme.	

Phase and how they work

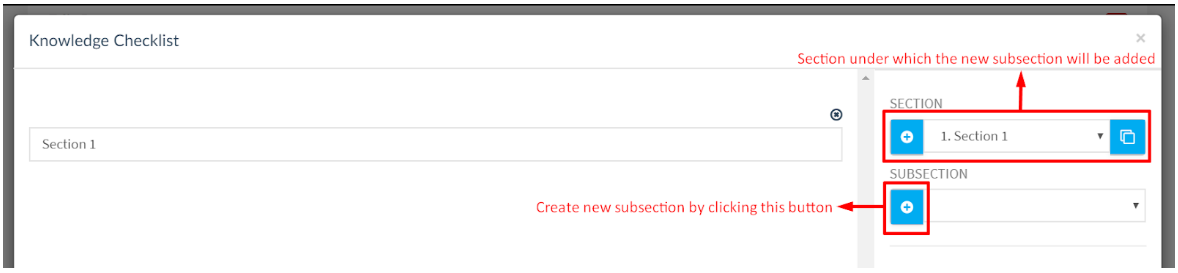
Knowledge

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.

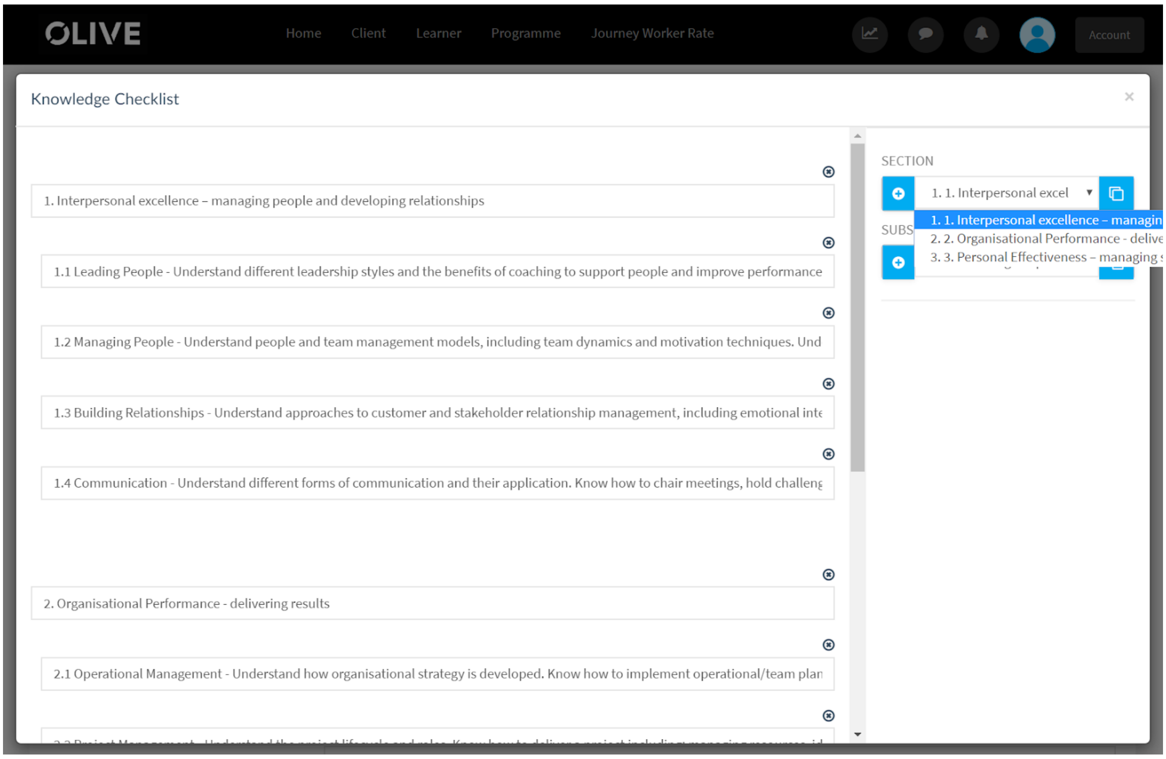
To create a new section you can click on the + button as shown below and if you want to create a copy of the current section you can click the copy button.



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,



[To see this from a learners perspective click this link]

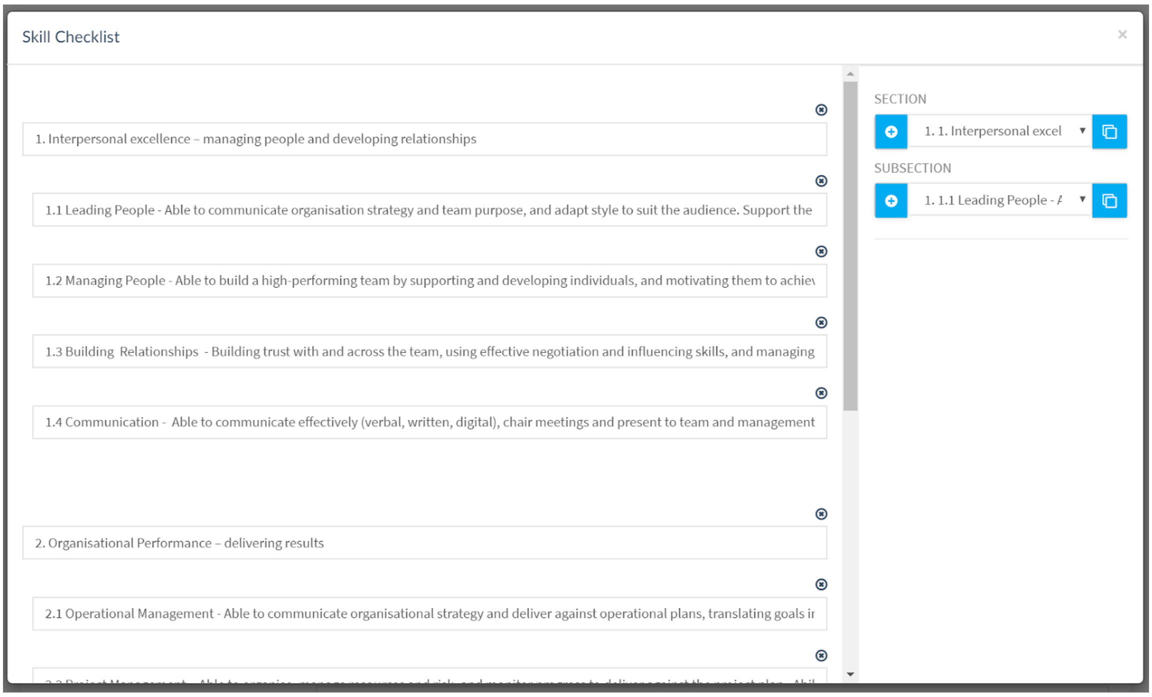
To Note: When you are adding subsections be mindful of which section you are adding the subsection into.

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

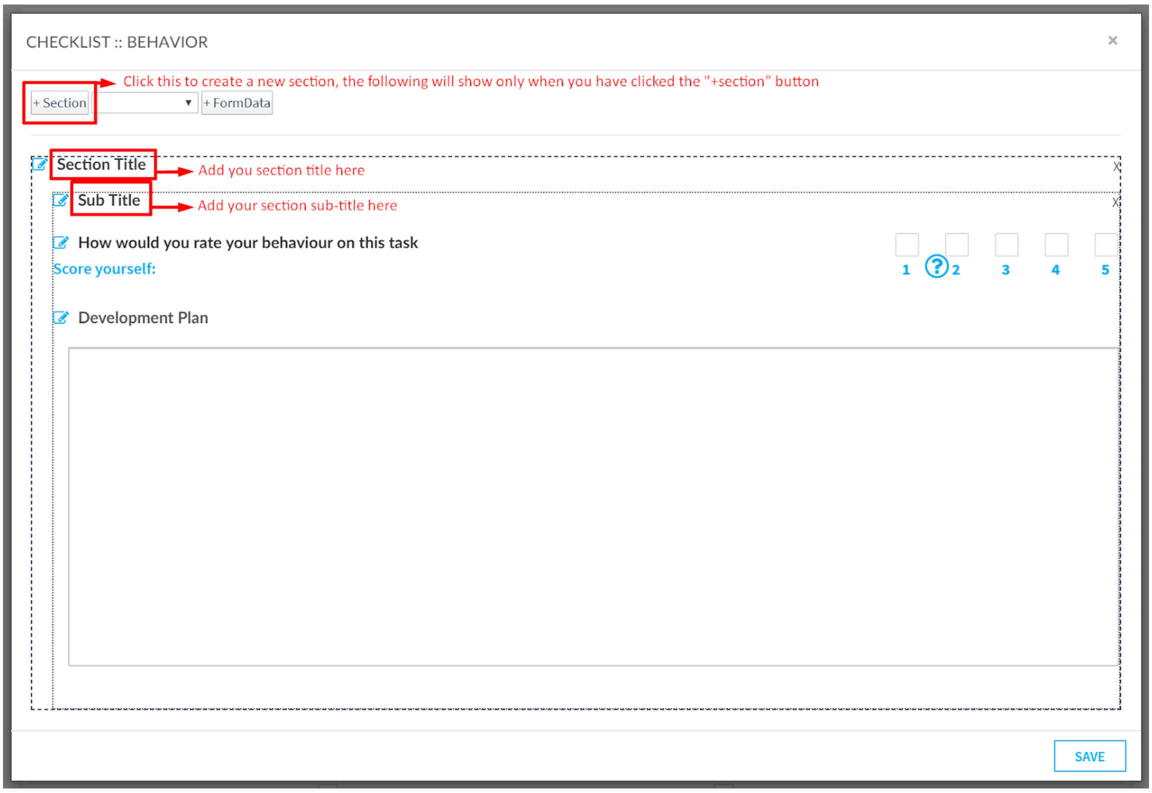
Once the Type B behavior has been created it needs to be duplicated again for A, the difference being when students put content in B it starts to added into A for review

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.

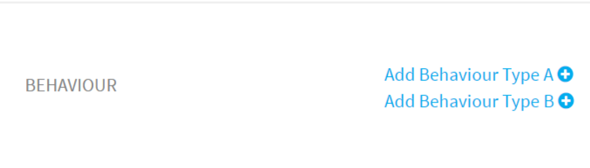
This will open the Behavior Checklist editor type B and you can click on the "+Section" to add your first section as shown below,



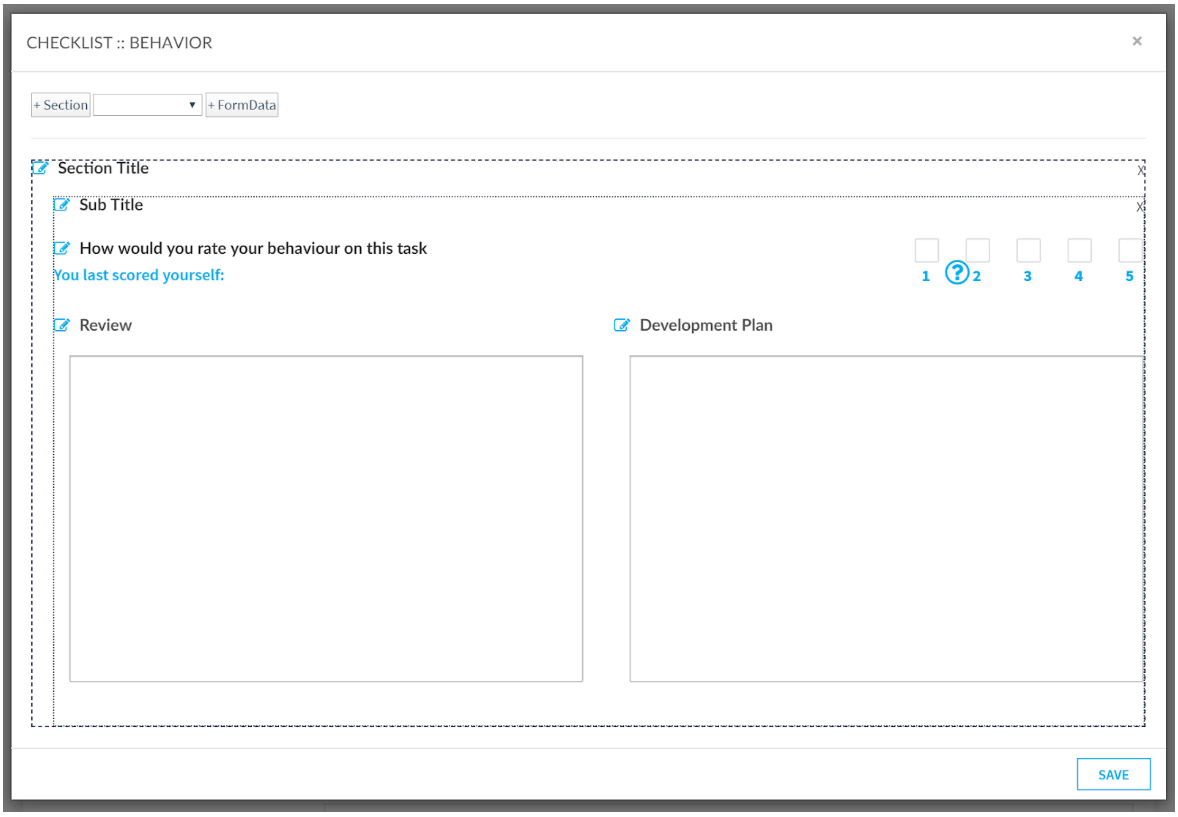
To see this from a learners perspective click this link

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.



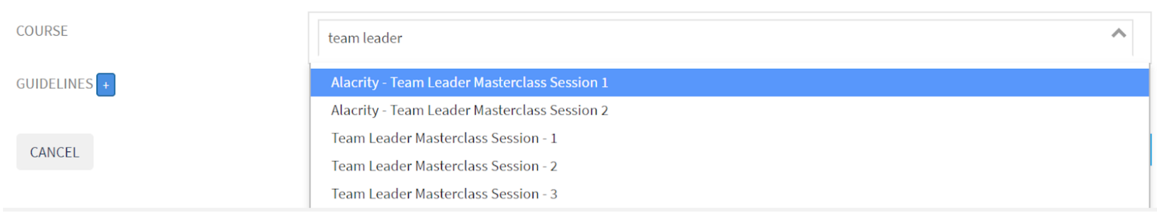
This will open the Behavior Checklist editor type B and you can click on the "+Section" to add your first section as shown below, as you can see the Type A has a new box that says review, where the content from the type B or previous Type A's will be pulled.



[To see this from a learners perspective click this link]

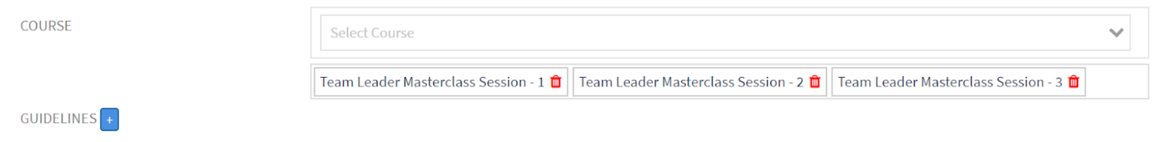
To Note:
The review side of the behaviors will work only once the previous section of the checklist has been filled by the learner and is seen only from the learner's perspective and not in the programme building stage.

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.

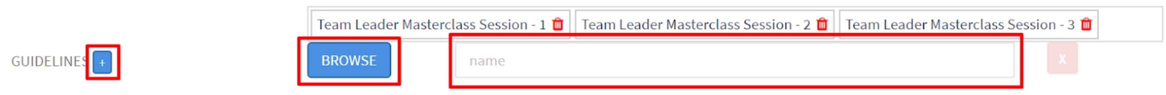


Once You have selected a masterclass as your programme phase, you have the ability to choose what course needs to be added to the particular masterclass.

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



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,



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

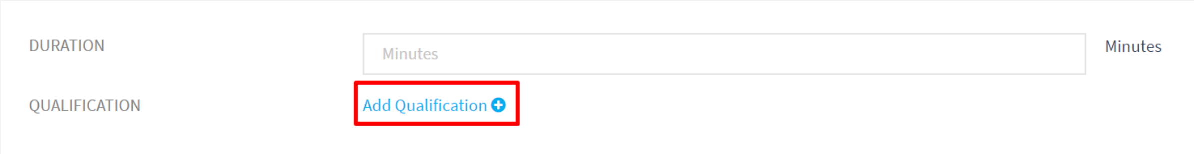
Once the file has been uploaded you can give the file a name to show up when the student looks at the mastersession.

Supported file types for upload
Documents: .doc

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

[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,

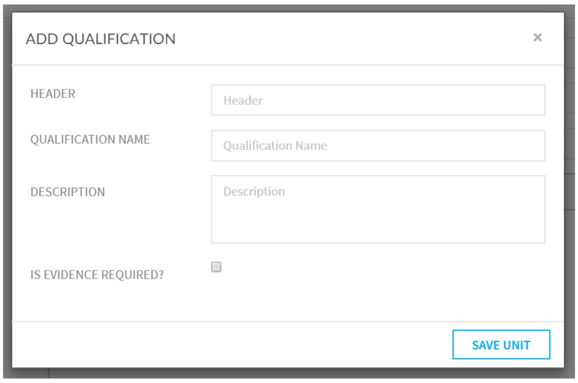


Clicking on "**Add Qualification**" will open the Add Qualification window as shown to the side.

Header is the **section heading** and the qualification name is where you would type in the qualification name,

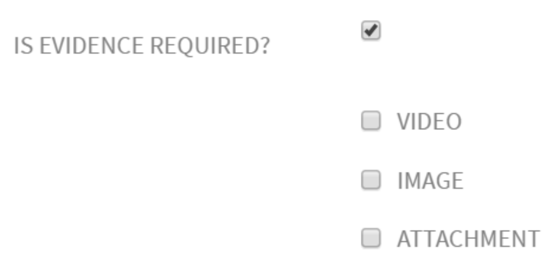
Description for the section title.

By clicking the "**Is Evidence Required**" tick box, learners will have the ability to upload evidence.

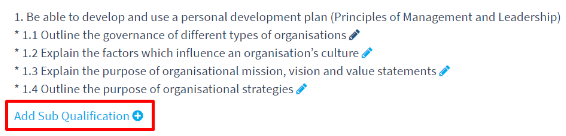


Once the box is ticked, the system will ask for what type of evidences can be uploaded,

- Videos
- Images, and
- Attachments

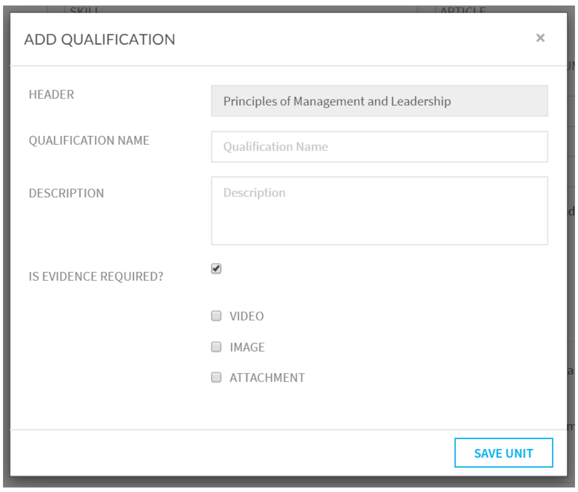


Once the qualification heading has been added and saved, the option to add the sub-qualification option will come up as shown here,



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)

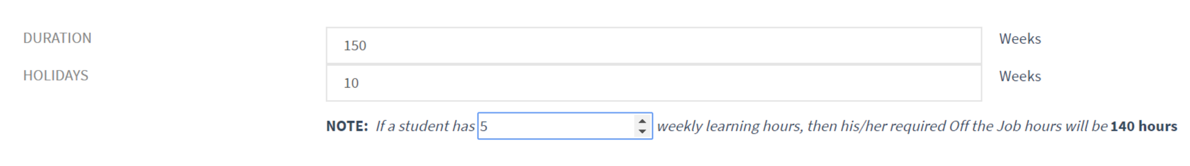
To create an Off Job Training Log you can tick the Programme phase as "Off Job Training Log", this will bring up the option to set the timings as shown below,

DURATION	0	Weeks
HOLIDAYS	6	Weeks

NOTE: *If a student has* 0 *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.



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,

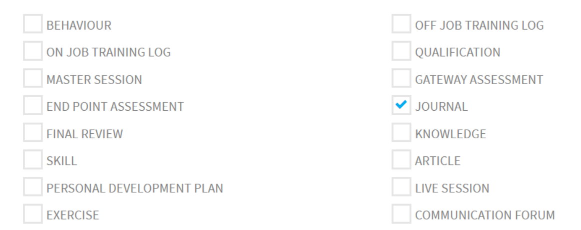
To see this from a learners perspective click this link

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.



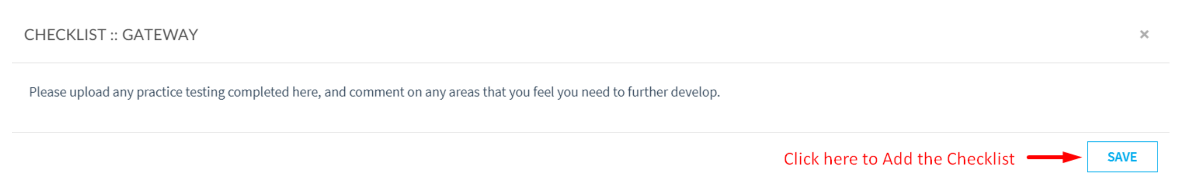
To see this from a learners perspective click this link

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.

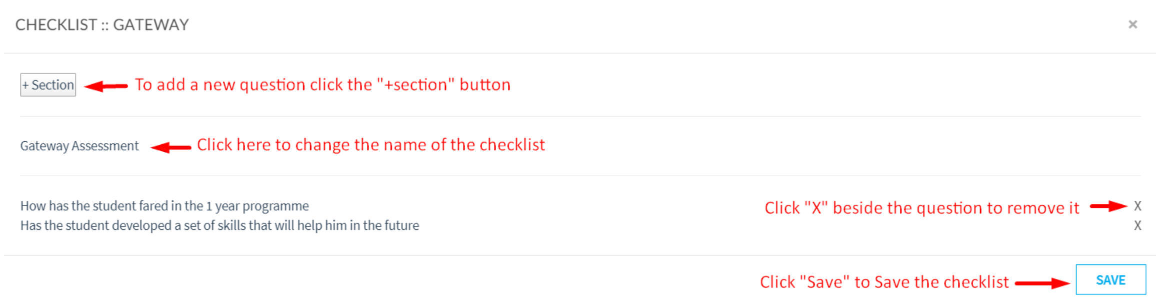
To create a gateway assessment click on "Gateway Assessment" as the Program Phase. Once this has been selected you will have the option to select the type of Assessment as shown.

Gateway Assessment 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.



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,



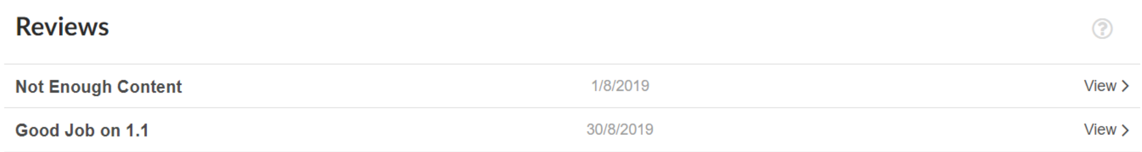
You can change the name of the checklist, add new questions and delete them using the form builder and once you are happy with the questions you can click "Save" to apply the changes.

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.



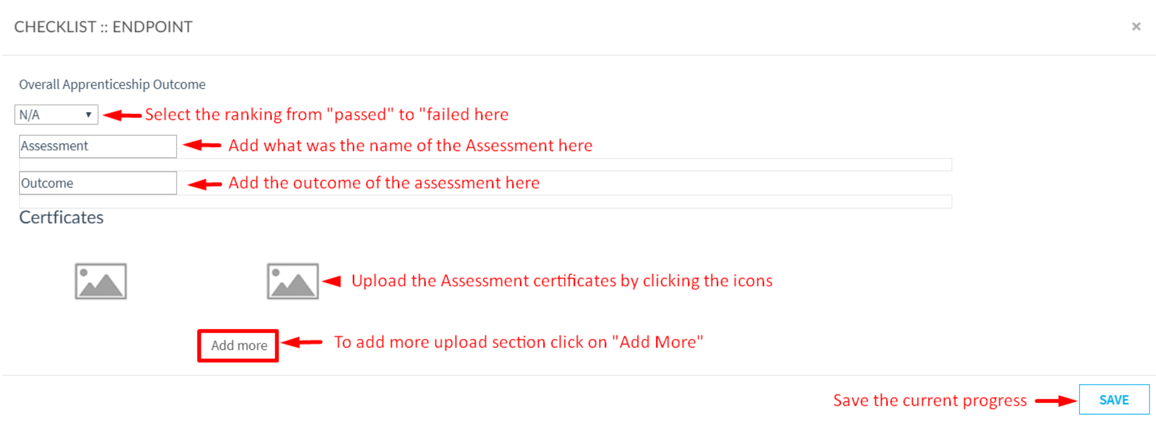
We will be looking into more depth about the reviews in the Assessor and Learner section respectively.

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.

This will open the checklist builder as shown below

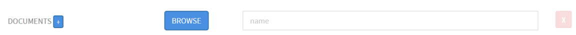


Here you can select the ranking, what assessment the learner is being ranked on and the outcome with the certificates attached to the learner.

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.



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:

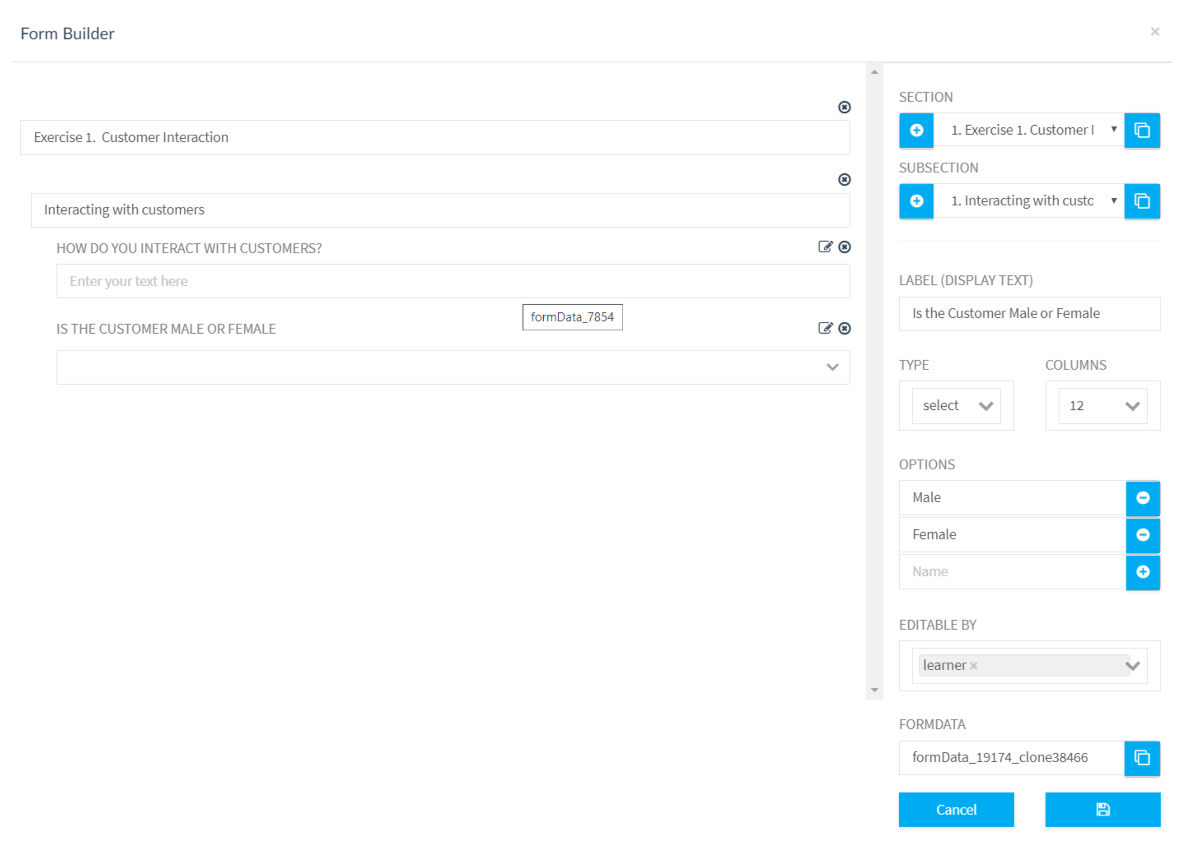
Once the live session has been created the Client Admin will be able to create the room and add members to the call. To see how this works click on this link.

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.

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

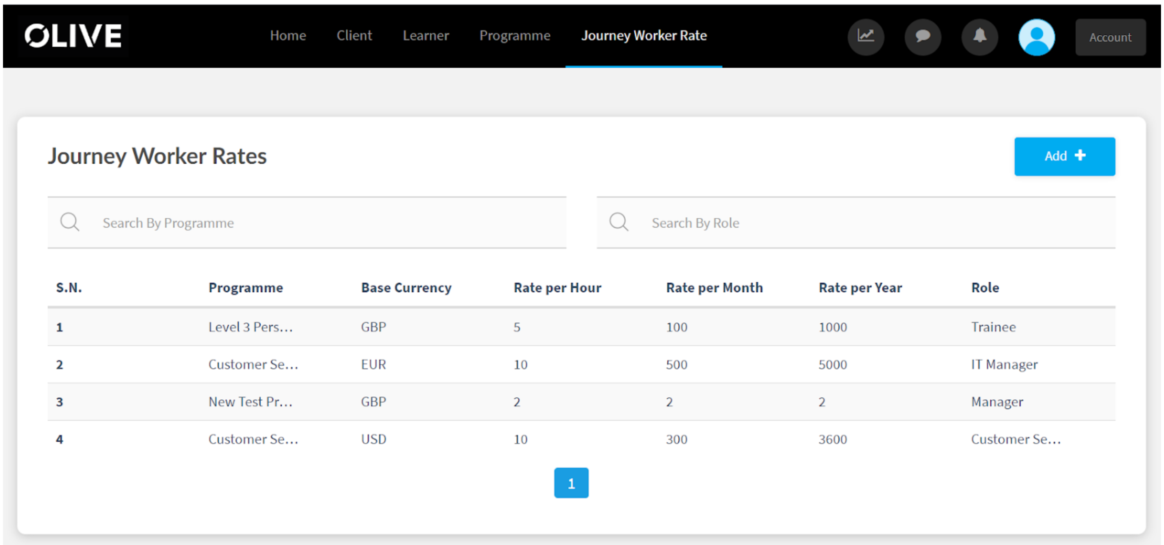
Communication Forum - Week Specific Phase Type

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.

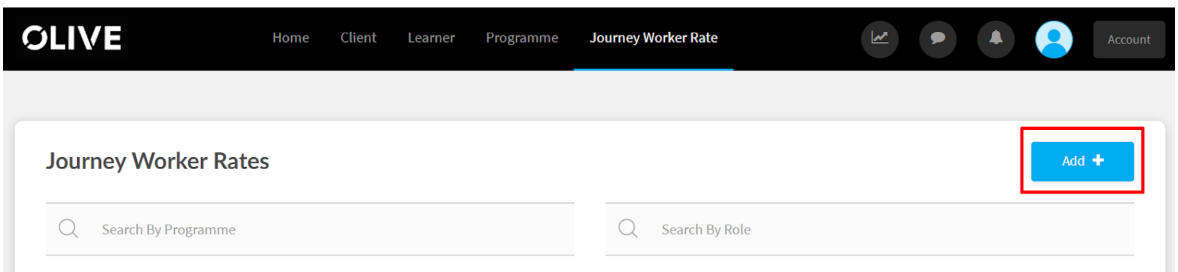
A typical Journey Worker Rates page should like like below



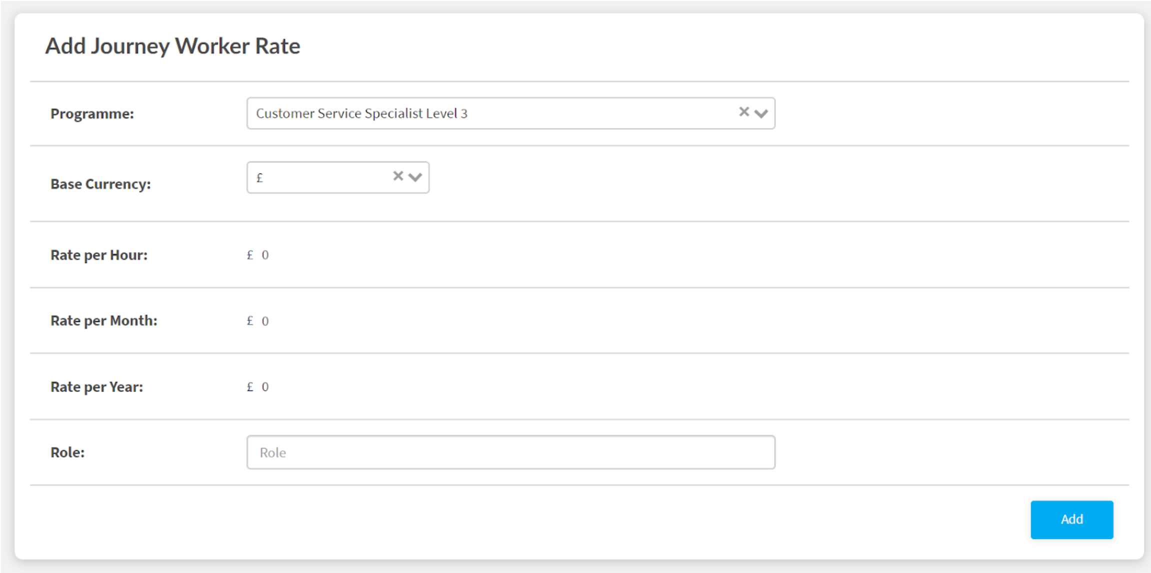
S.N.	Programme	Base Currency	Rate per Hour	Rate per Month	Rate per Year	Role
1	Level 3 Pers...	GBP	5	100	1000	Trainee
2	Customer Se...	EUR	10	500	5000	IT Manager
3	New Test Pr...	GBP	2	2	2	Manager
4	Customer Se...	USD	10	300	3600	Customer Se...

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**"



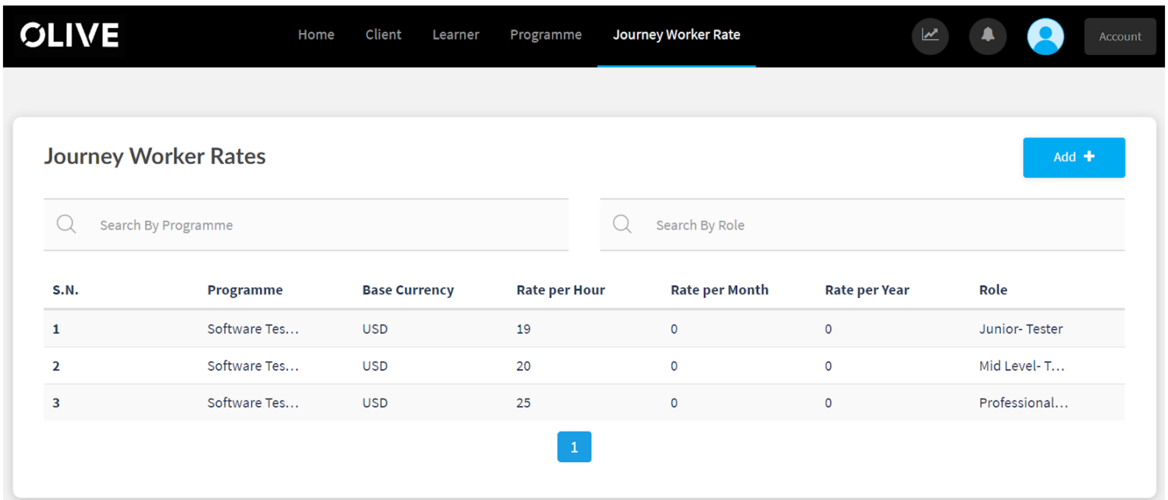
Here you can fill in the following information,

- **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

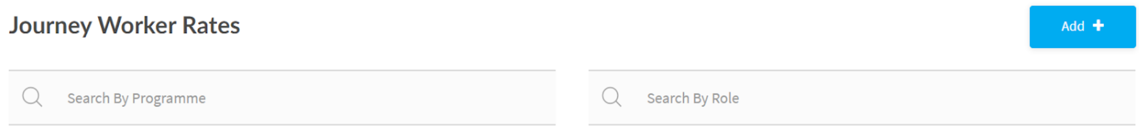
Journey Worker Rates

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,

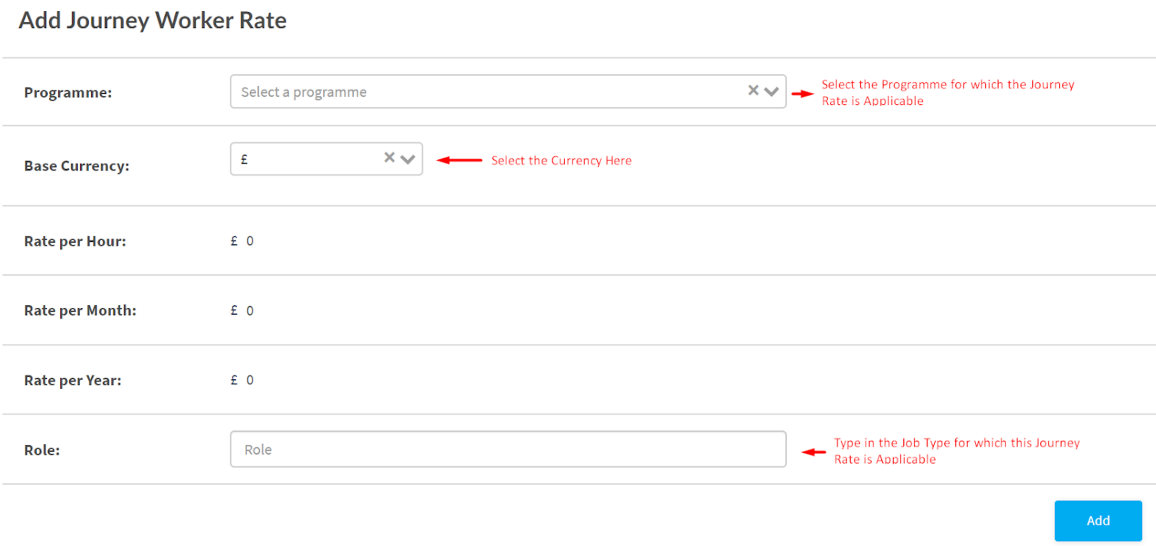
This will open the Journey Worker Rates page as shown below,



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



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,



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.

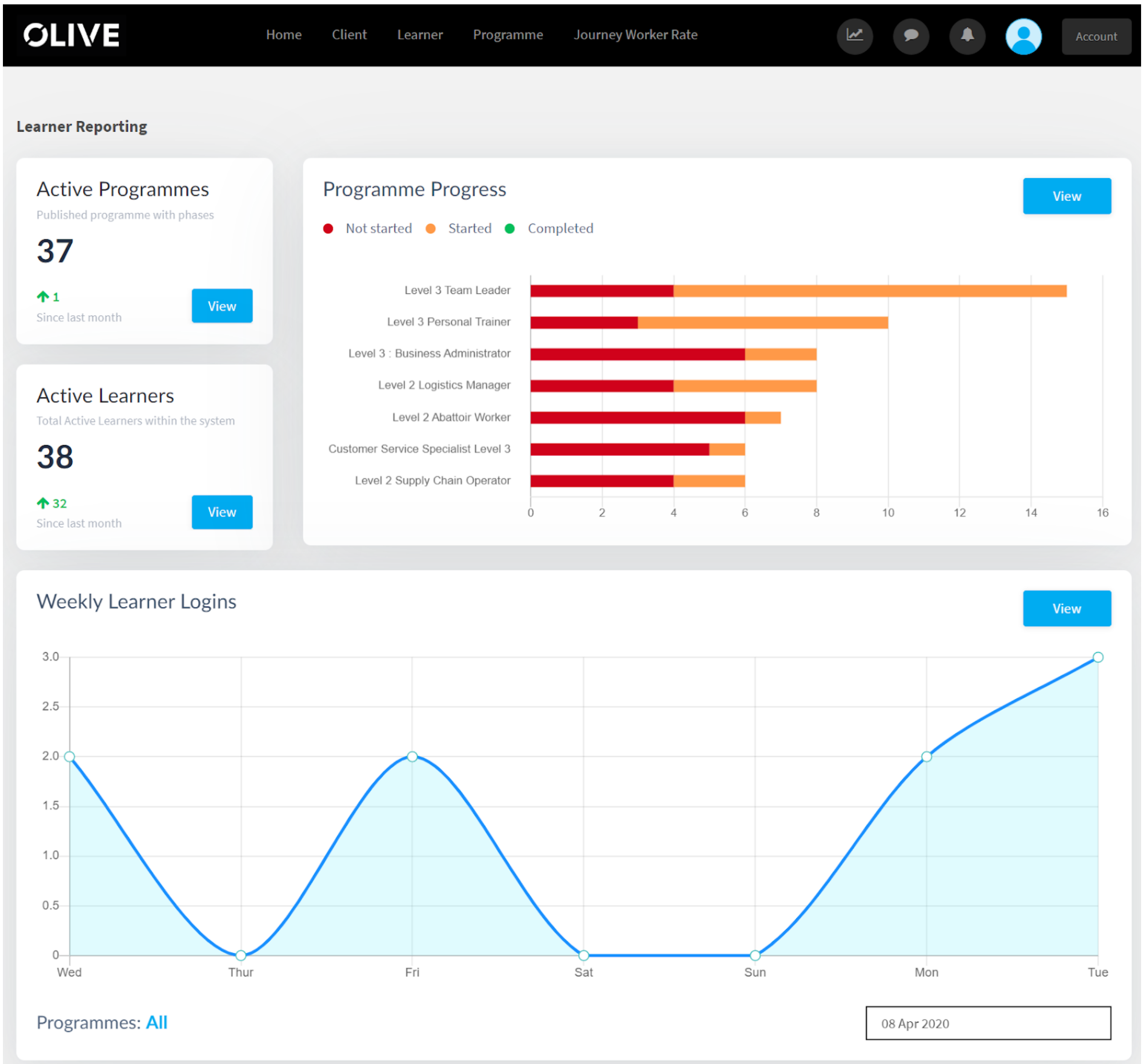
Reporting

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,

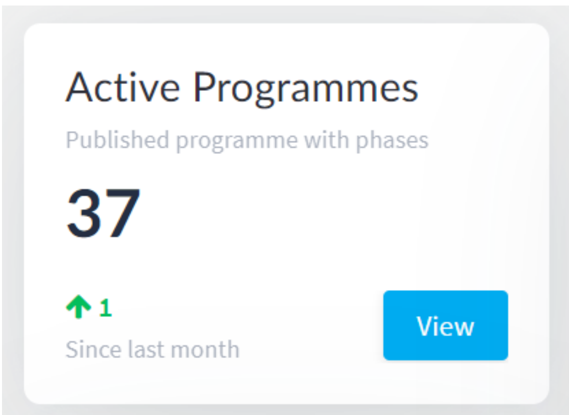
- ★ Active Programmes
- ★ Active Learners
- ★ Programme Progress
- ★ Weekly Learner Logins

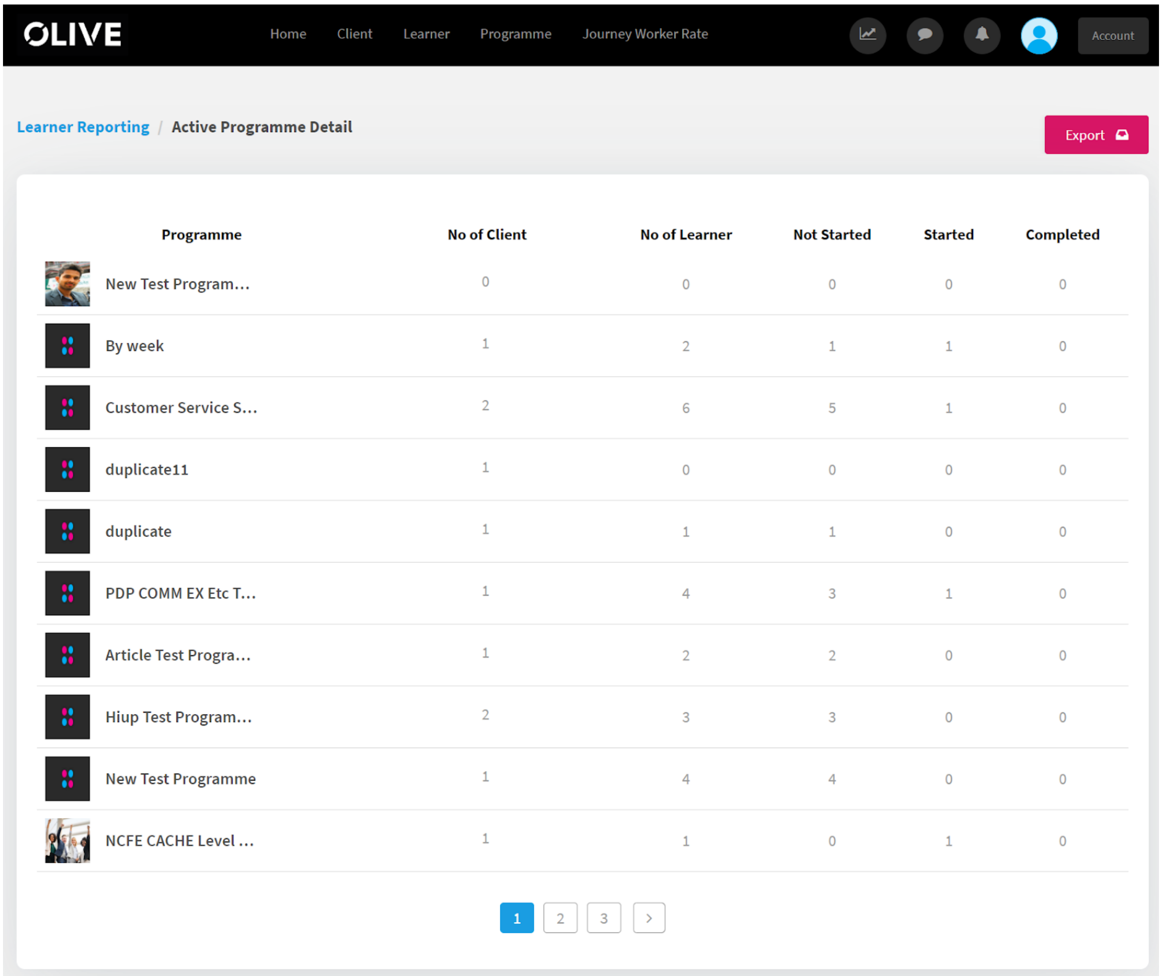


Active Programmes

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.





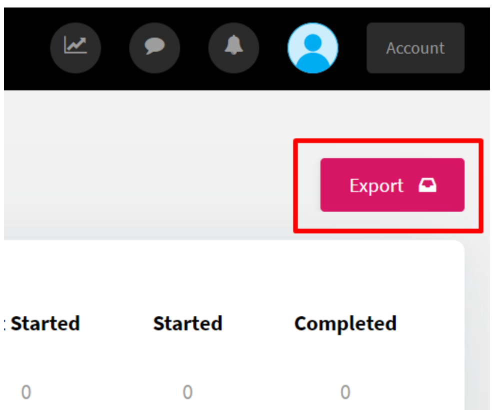
Programme	No of Client	No of Learner	Not Started	Started	Completed
New Test Program...	0	0	0	0	0
By week	1	2	1	1	0
Customer Service S...	2	6	5	1	0
duplicate11	1	0	0	0	0
duplicate	1	1	1	0	0
PDP COMM EX Etc T...	1	4	3	1	0
Article Test Progra...	1	2	2	0	0
Hiup Test Program...	2	3	3	0	0
New Test Programme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

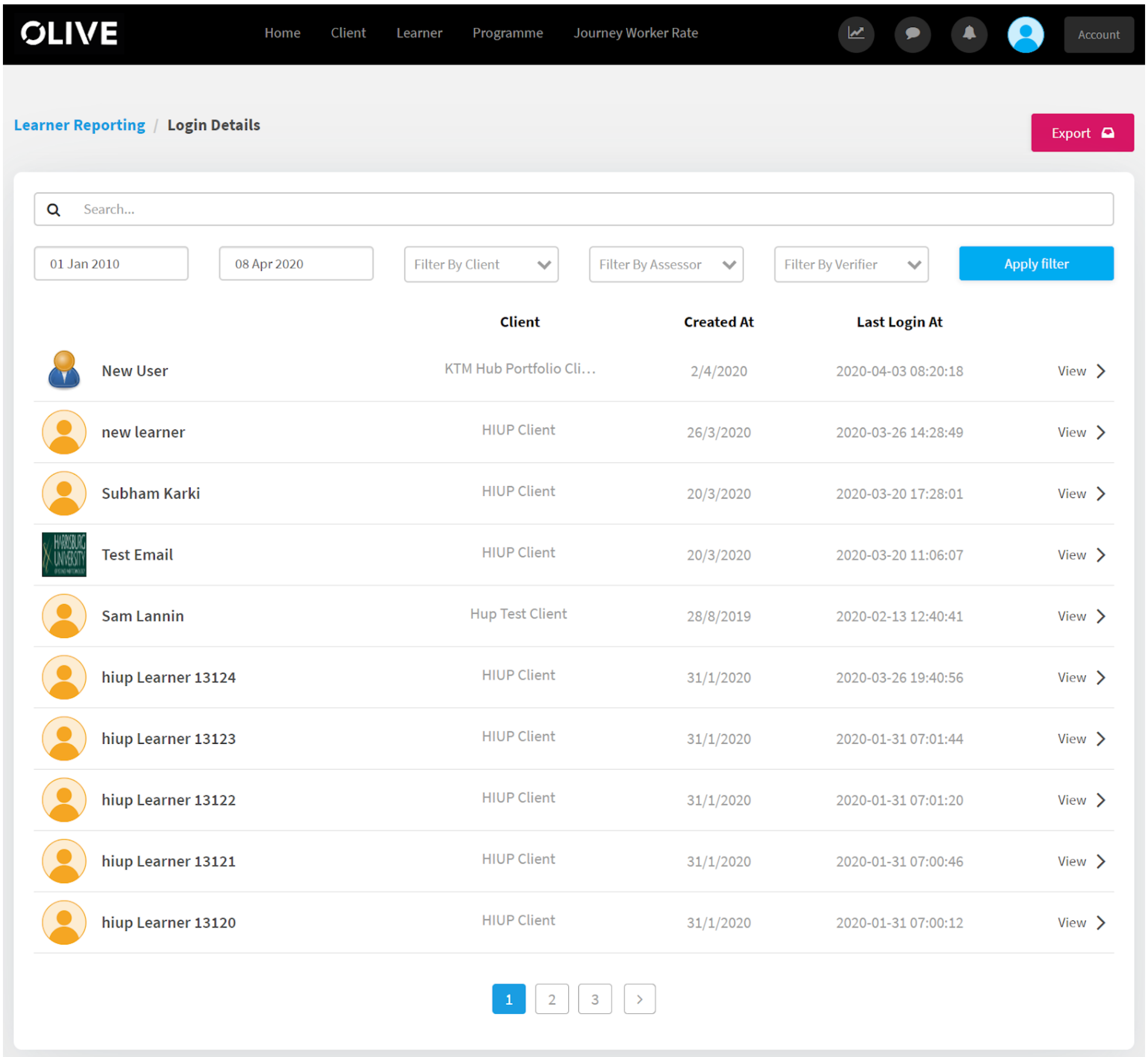
To Export the list as a spreadsheet or as an excel file you can click the export button on the top right of the screen.



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,

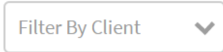


Filtering Learners

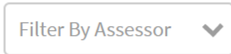
You can search for a particular member of filter the results based on the following criterias,

- ➢ **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

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



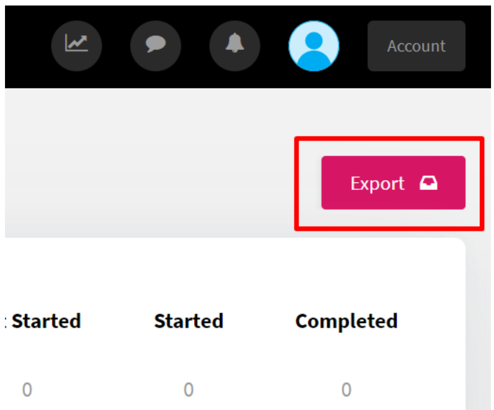
- **Filter by Assessor** - Here you can choose an assessor and filter all the students that he is mentoring.



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

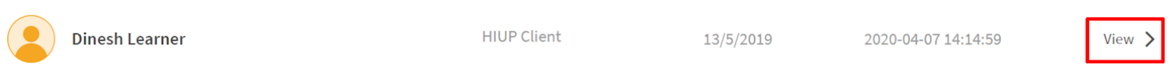
Applying the Filter
Please make sure you click on the Apply Filter button once you have set your filtering option to filter the results.

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.

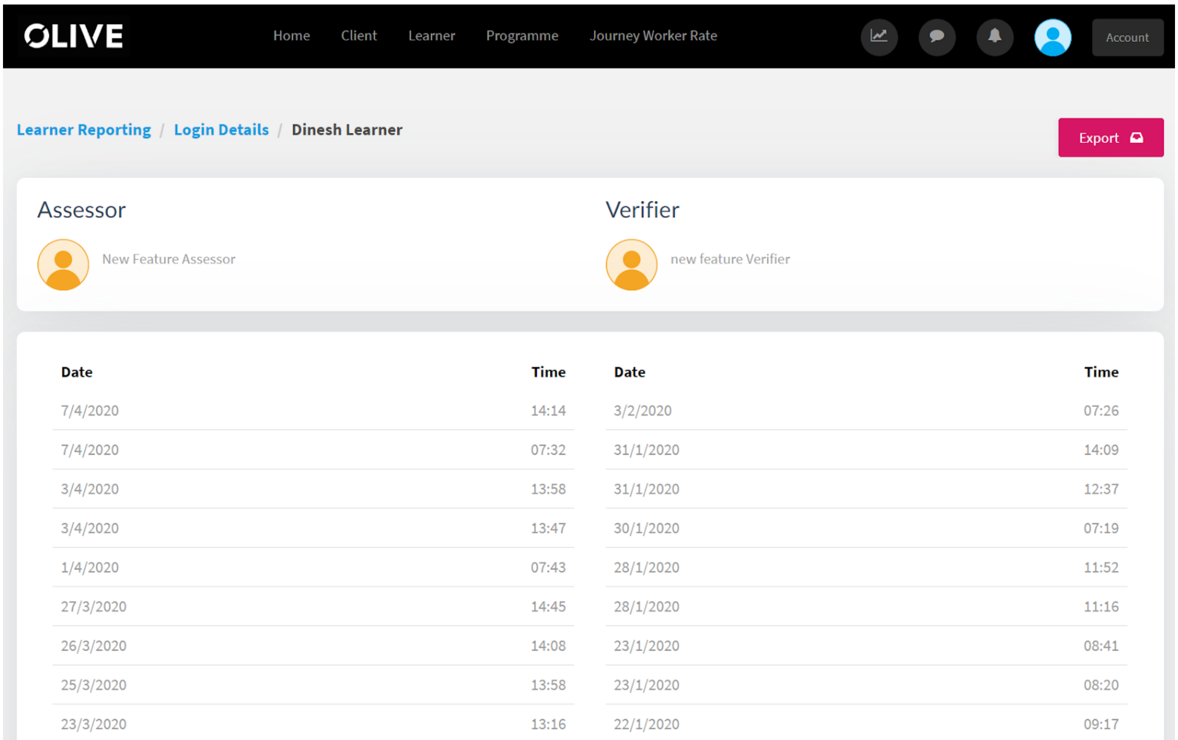


Individual Learner Login Timings

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.

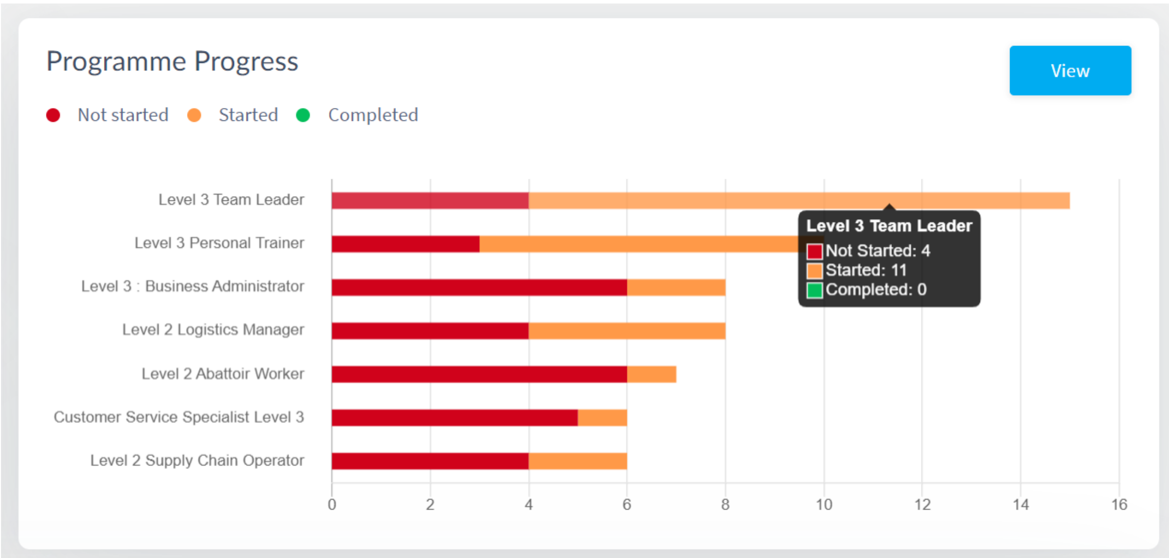


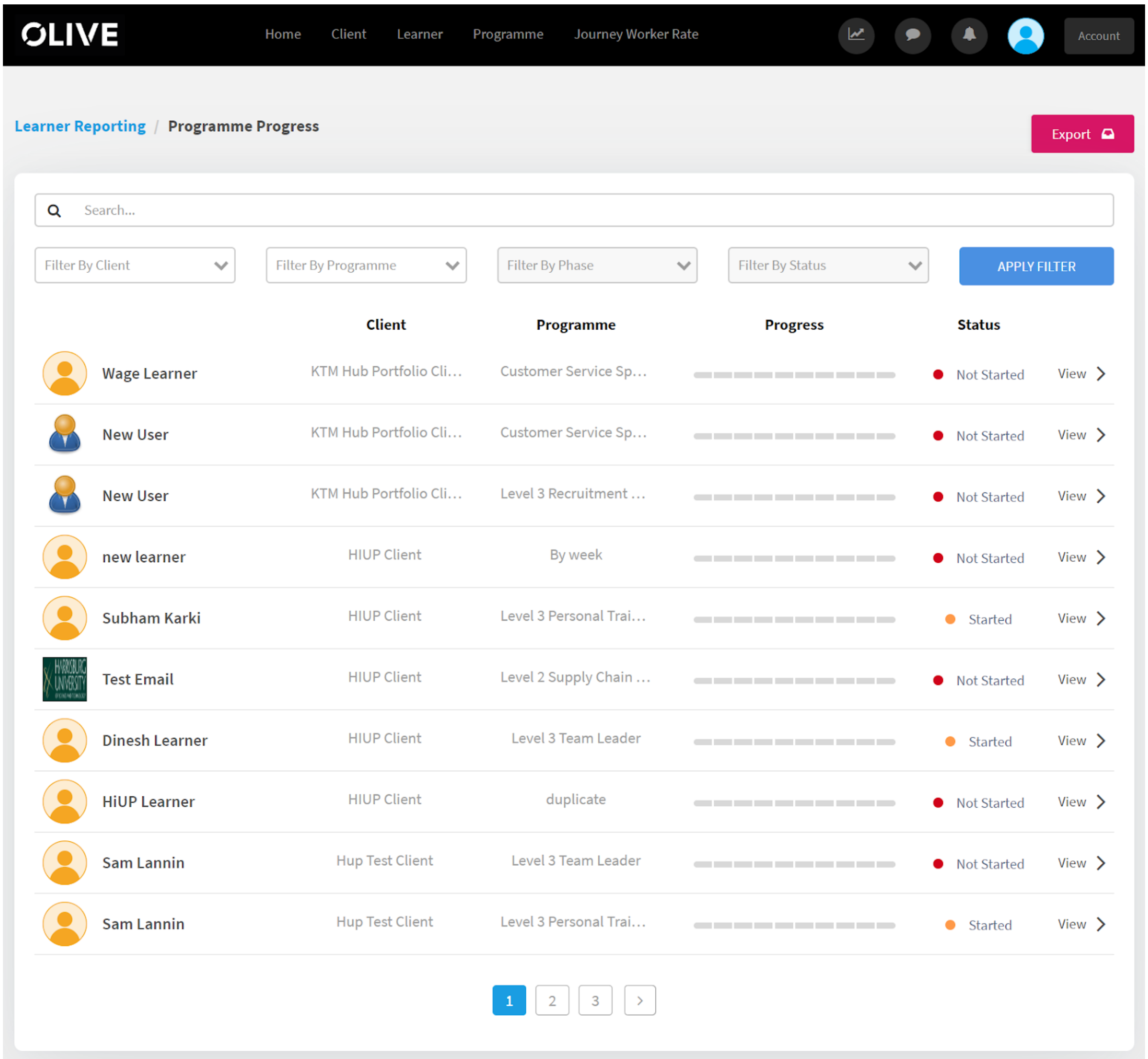
A usual login log would look like the one below, showing who the assigned Assessor and Verifier is, with the Login timings for the learner. This can also be downloaded using the "Export" button on the top right of the page.



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.



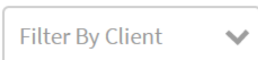


The above is an example of an in depth Programme Progress screen and here we can see the Learner, which organisation the learner belongs to, what programme they are doing, the current progress, status (not started, started, completed).

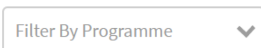
Filtering Programmes

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

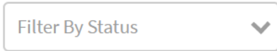


Once a programme is selected you can further select,

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

Once a phase has been selected you can further select,

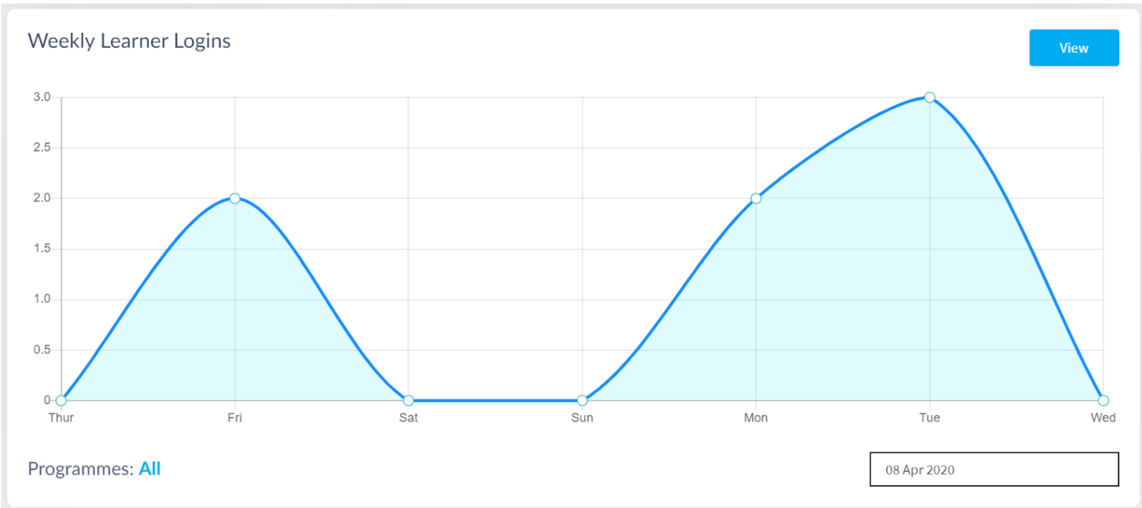
- **Filter by Status -** Here you can choose to filter the phase based on Not Started, Started and Completed.



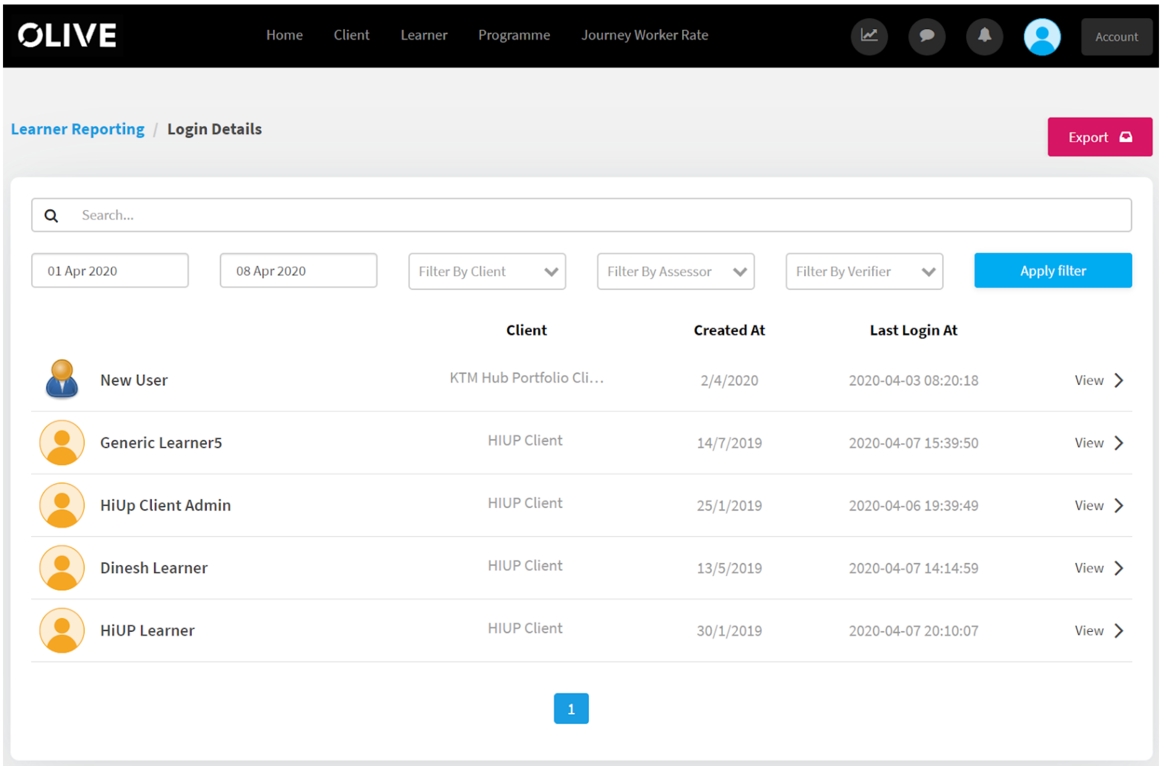
Dependent Filters
Filter by Phase and Filter by status are dependent filters and in-order to activate them, the previous filter must be set.
Filter by Programme > Filter by Phase > Filter by Status

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.



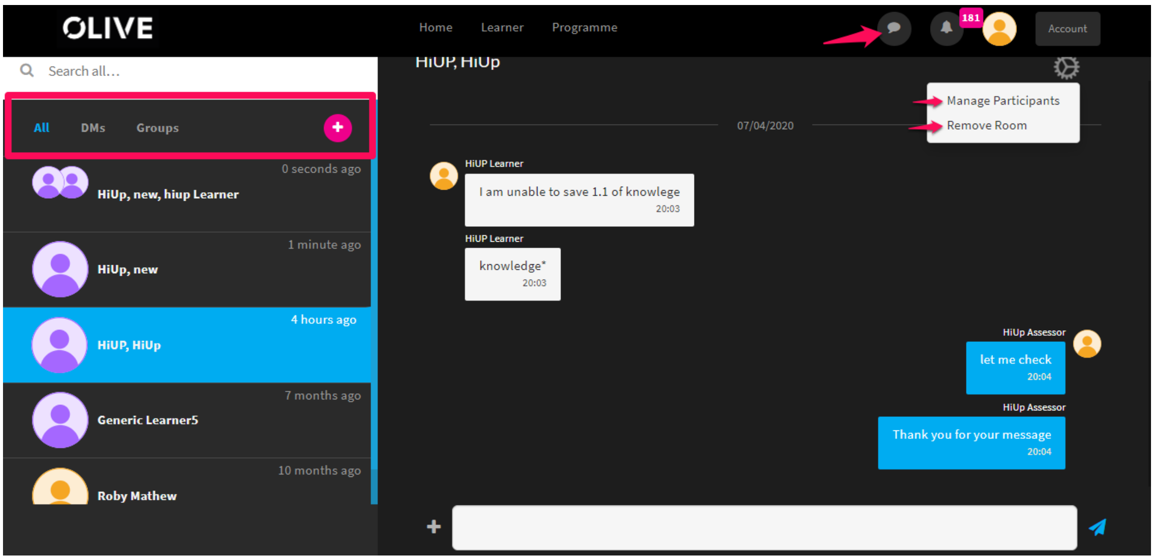
By clicking on view this will give a more in-depth look of the login details as shown below,



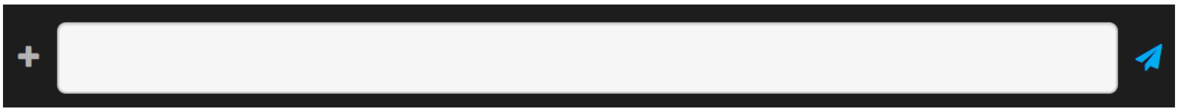
This reporting dashboard is similar to the active learner dashboard, if you would like a recap please click the link to see how the filtering and login information works.

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.



Sending Files

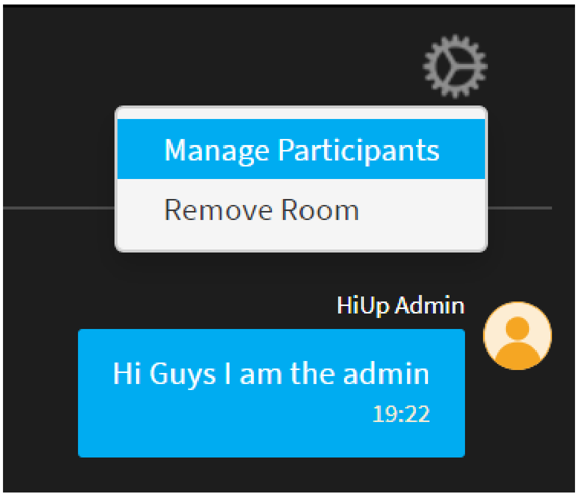


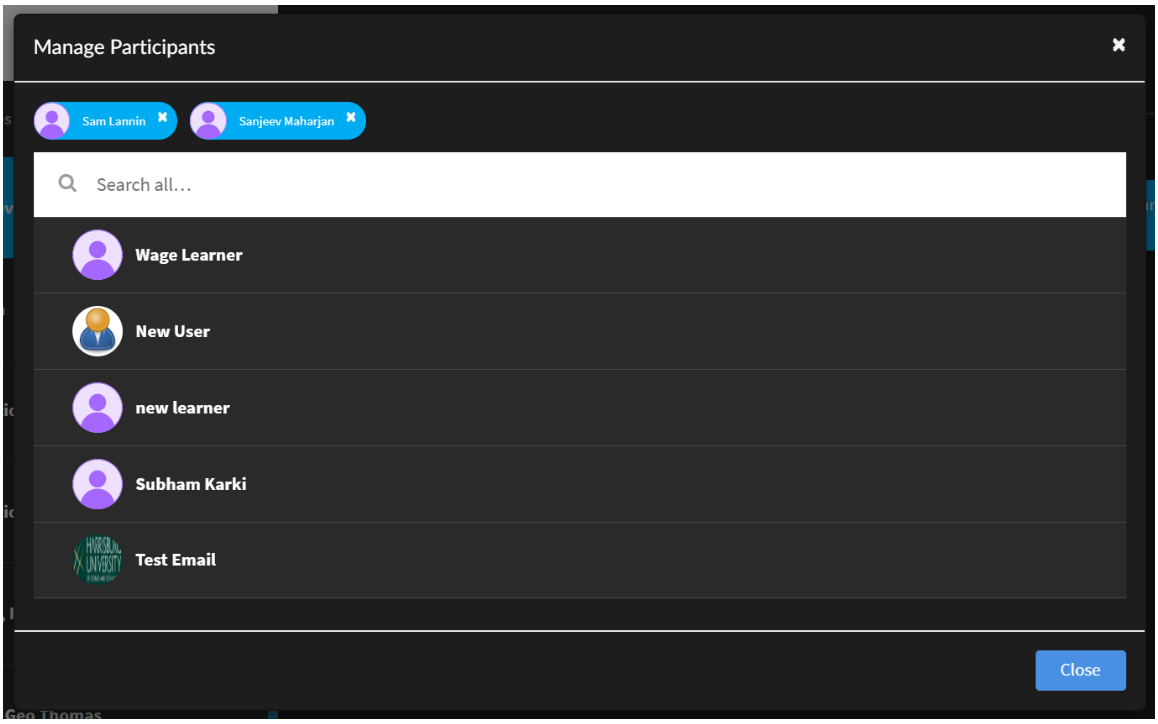
By Clicking the “+” icon beside the chat bar files can be added to be sent in the chat.

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.

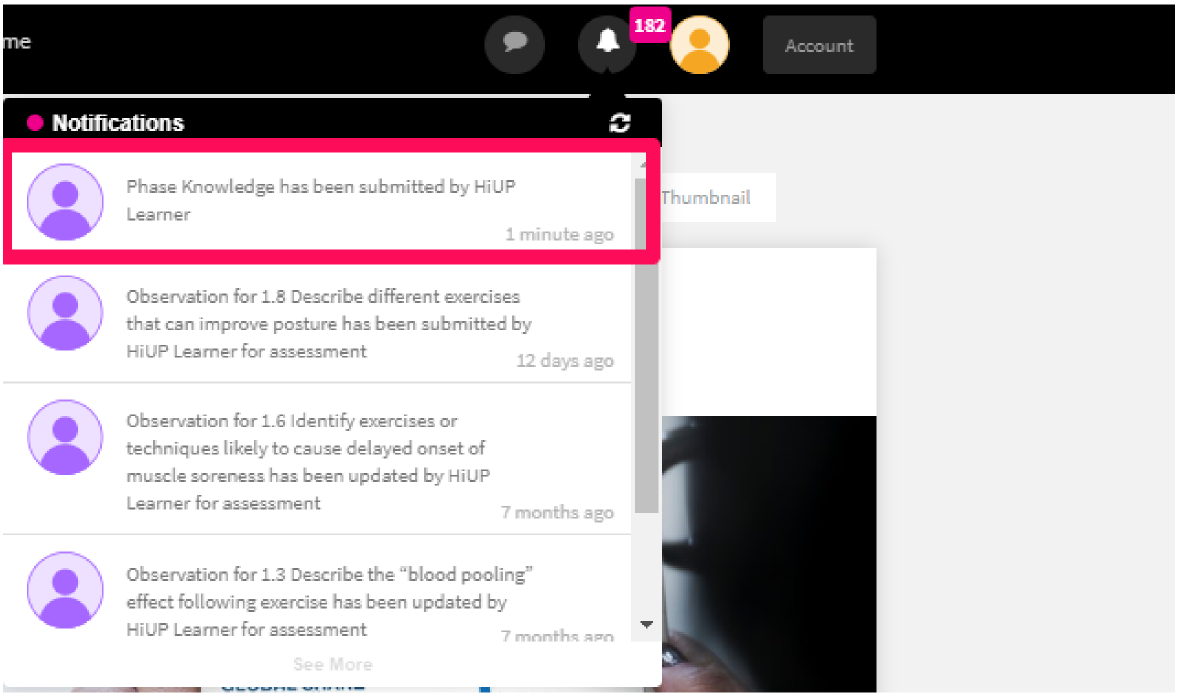
Remove Room, will permanently delete the room from the conversation list.





Notifications

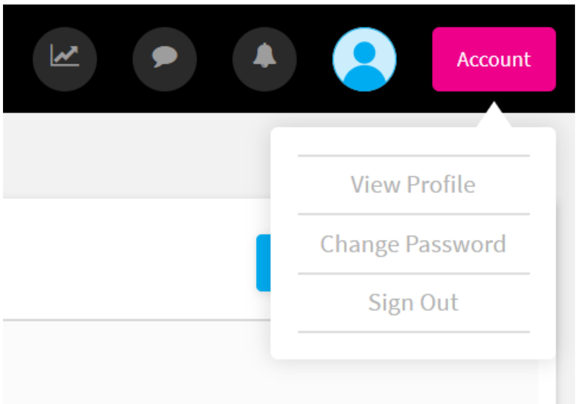
When you get a notification it comes up in the notification section, these include notifications when a student has submitted responses, or the assessor has reviewed and approved the response etc.



Account

The Account section consists of a view profile,change password and sign out functionality from the dropdown menu.

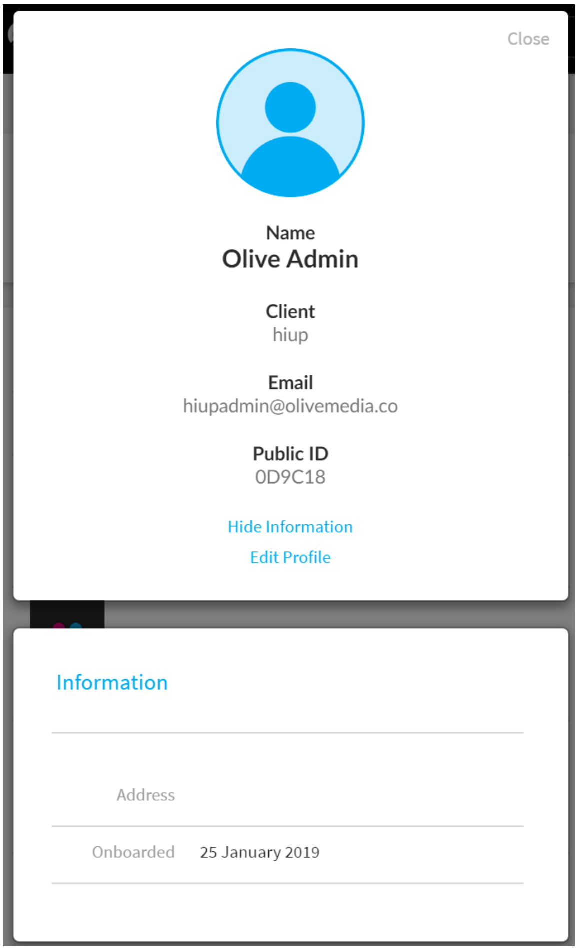
- View profile: allows view and edit assessor user profile
- Change password: changes password from the previous one
- Sign out: allows to log out from the system

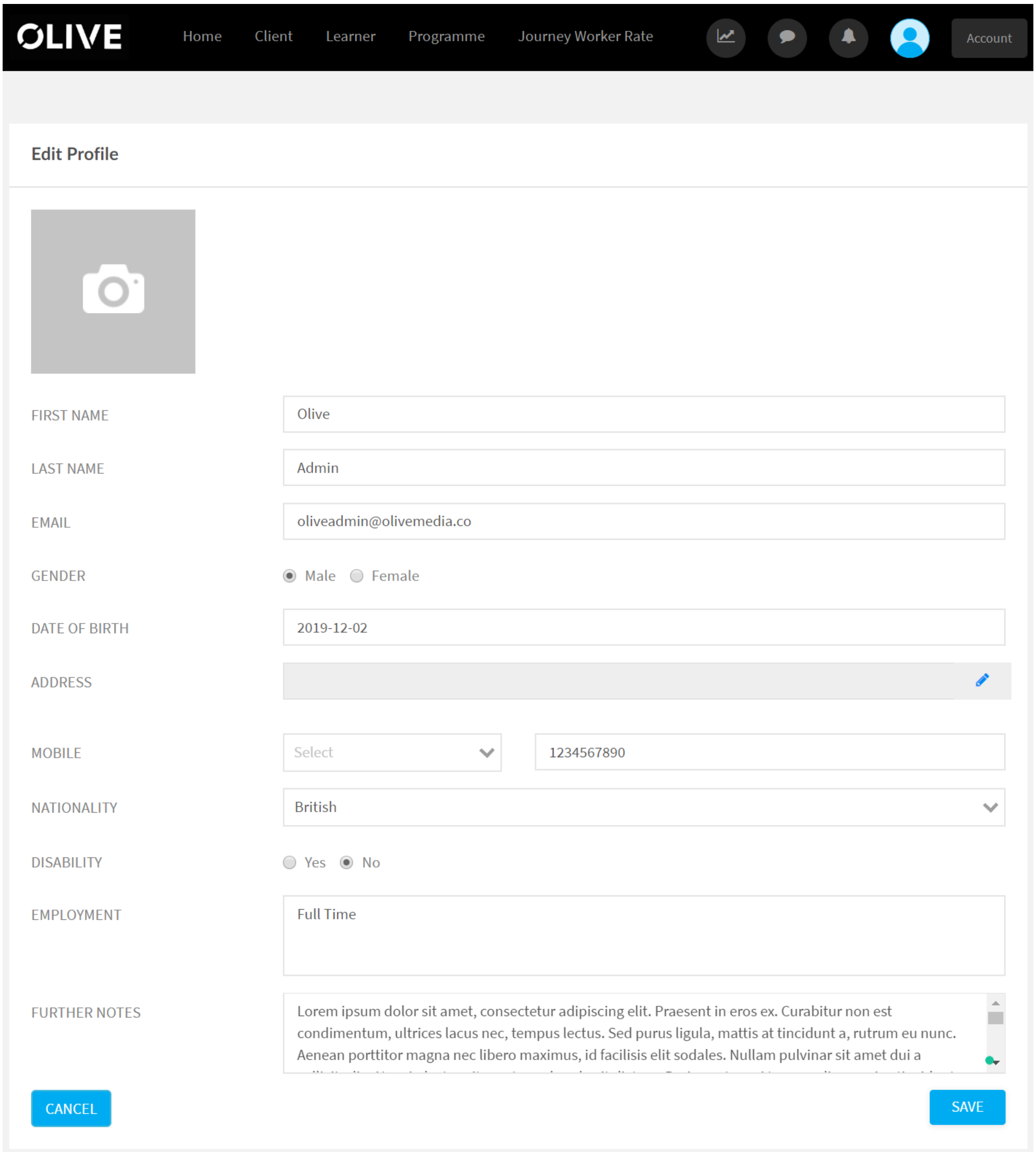


View Profile

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.





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.

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.