OLIVE

Portfolio Client Admin Guide

Guide for Client Admin users

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Client Admin

Logging in

Username and Password provided by Company

If you have already received a mail from your company or Olive with your username and password you can click the link to see how to login.

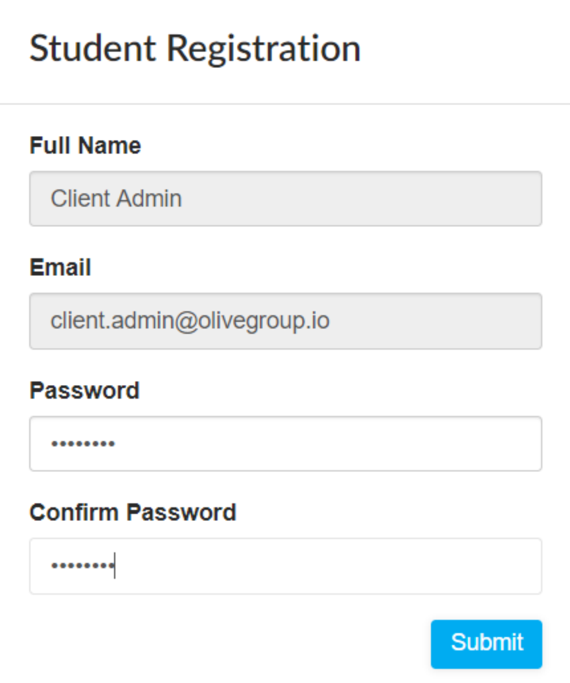
Registration Link Via Mail

Once the Parent Organisation or Provider creates your Client Organisation with your account you will get an email with the Registration link with which you can access your Client Admin Account. A general registration email should look like the following,

(Add Image here)

Once you click on the "**Registration**" link it will take you to the following page, and you can enter your password here.

Once you click on "Submit" you will be taken to your Dashboard/Homepage.

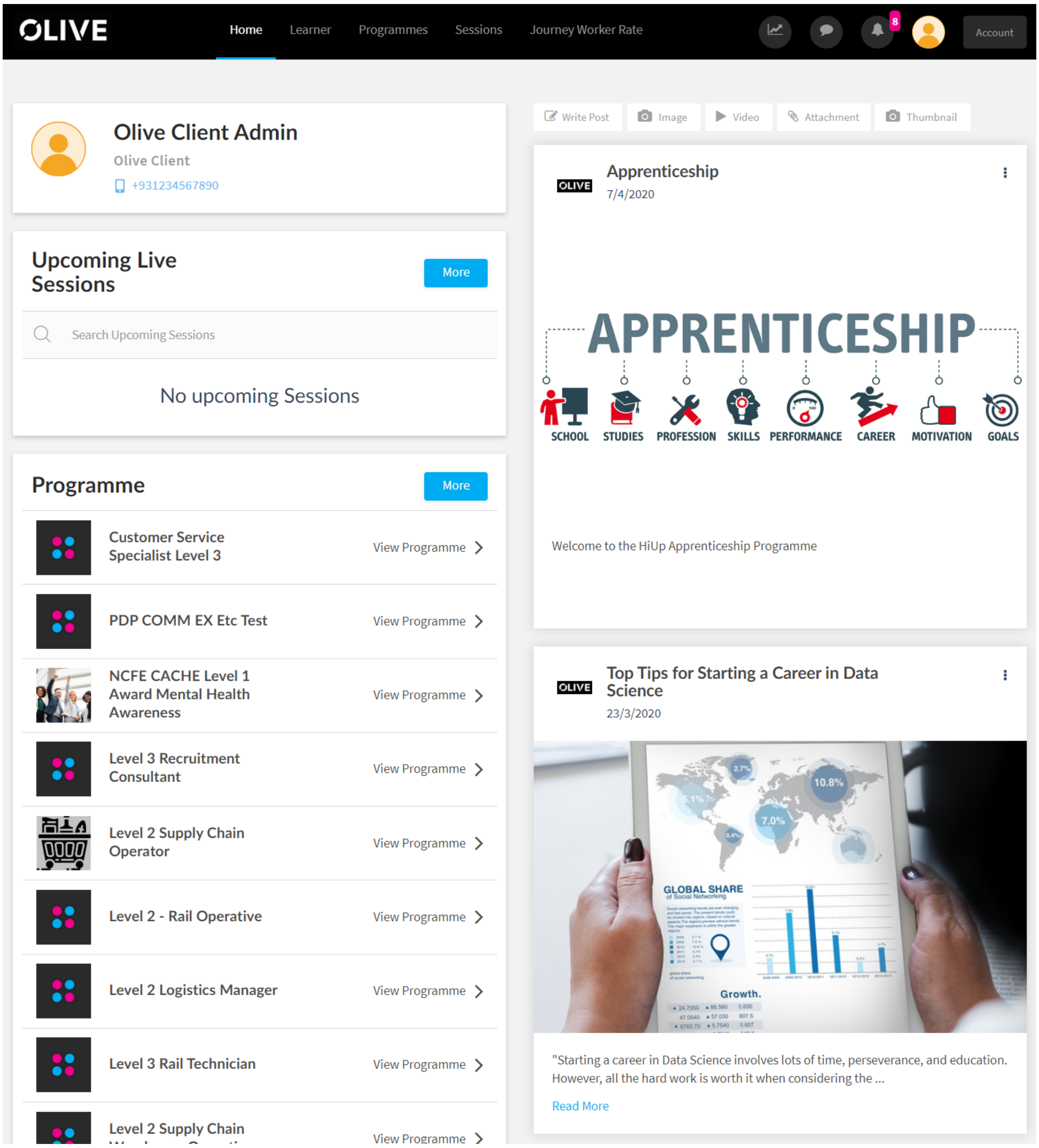


Password Policy
When creating your password is best to have a password that is,

★ 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.

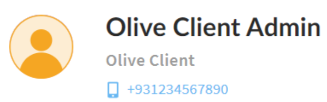
Dashboard/Homepage

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



Account Information

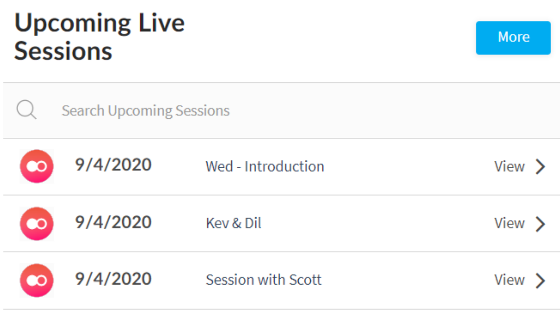
The Account information shows a snapshot of your account, here you can see your profile



image, your name, your organisation name and mobile number.

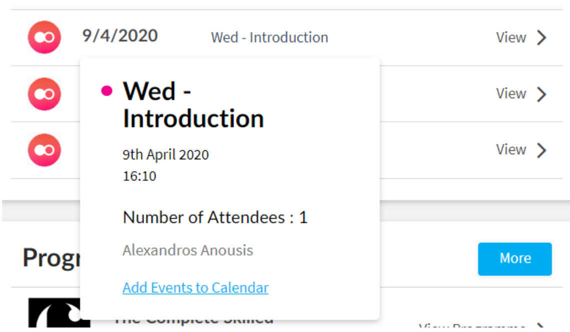
Upcoming Live Sessions

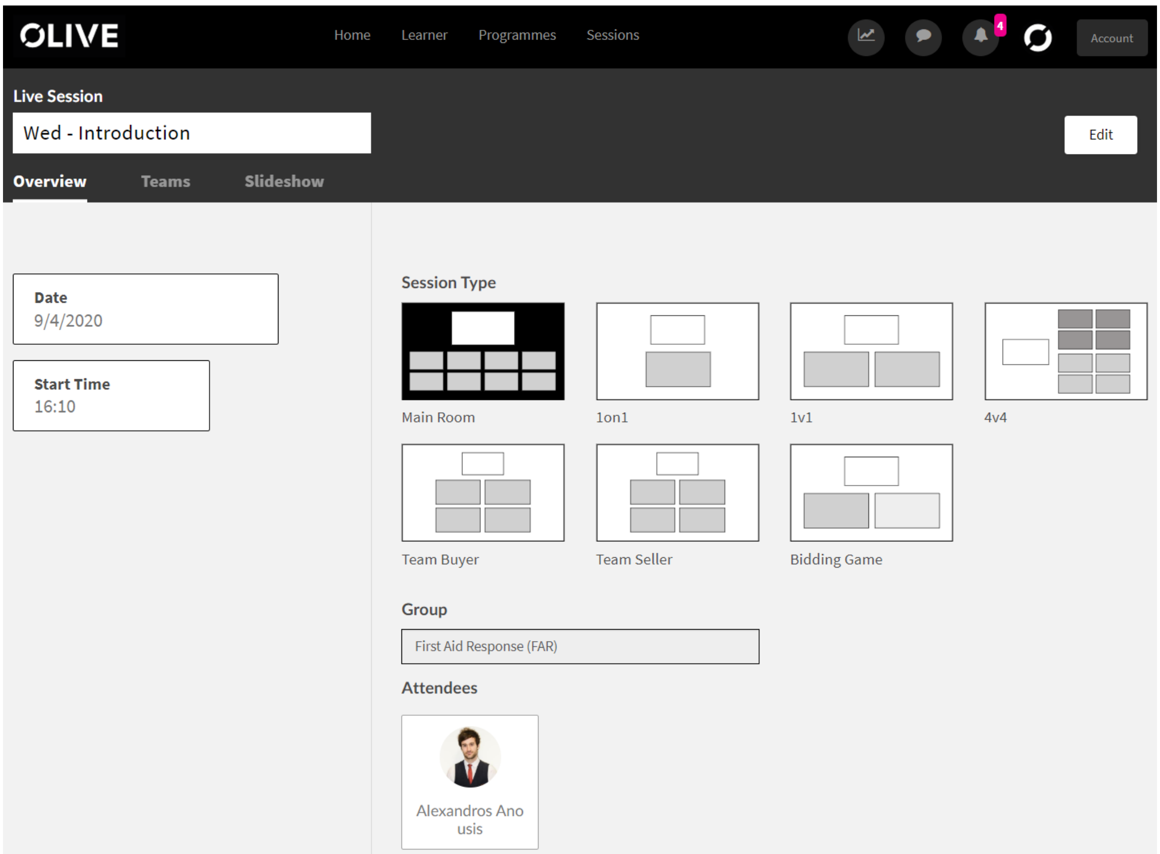
In the upcoming live sessions you can see a snapshot of the upcoming sessions, search for sessions using the “Search” bar.



To know more about a session you can hover your mouse over the date and it will give you more information as shown on the right.

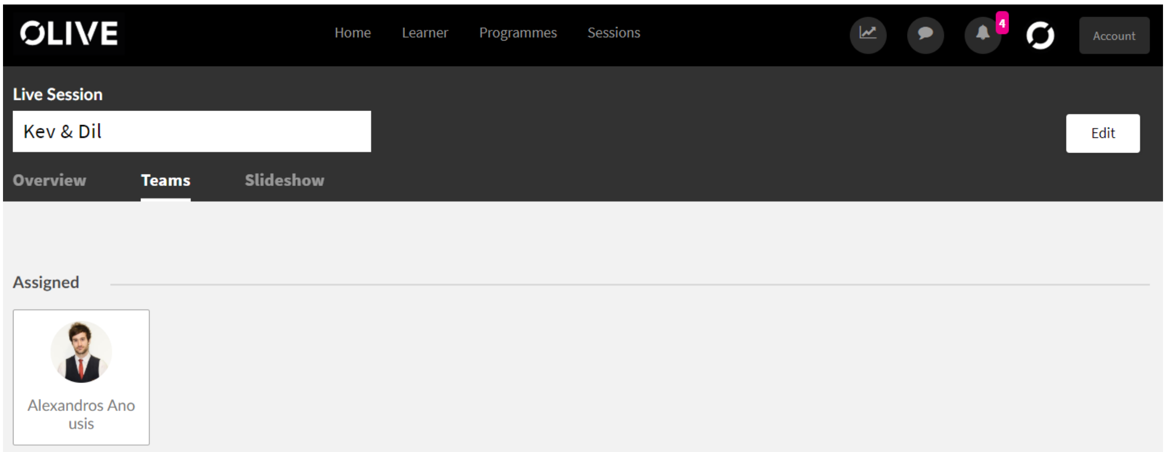
To have a thorough look of each session you can click on the “view” button beside each session and this will take you to the following page.





Here you can see the Overview of the session, the name, date and start time, along with what type of room has been selected, the group chosen for the session and the attendees.

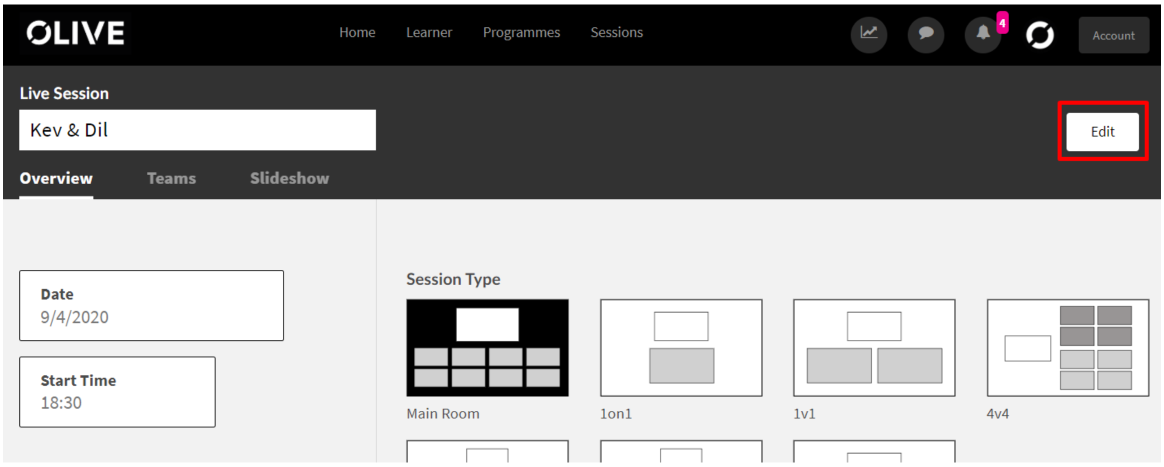
In the Teams section you will be able to see the assigned team members to this session as shown below,



In the Slideshow section, you can upload the slides that need to be showcased during the call, uploading the slides into the slides section ensures that all the attendees are able to view the slides at uploaded quality. A ready to go slide section will look like below,

(Insert image here)

To Edit a session you can click the “edit” button on the top right of the Live Session Page as shown below.



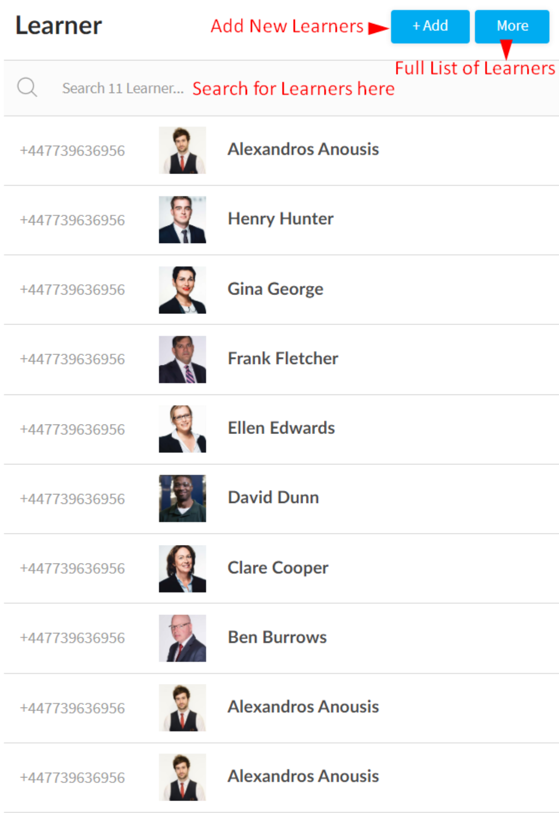
We will be looking into Session creation and editing in a later chapter, you can click the link to access this chapter.

Learners Section

The Learners section is a shortened version of the Learners page, here you,

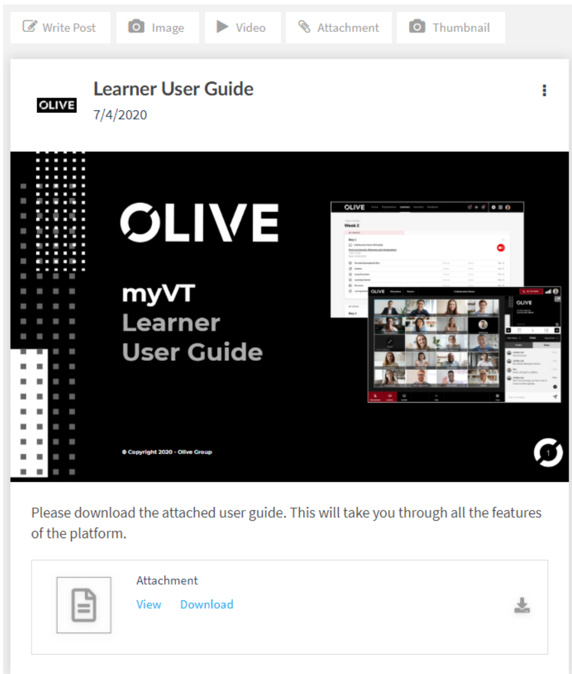
- Can see the latest learners
- Search for learners using the search tab
- Add new learners using the “+Add” button
- See the full list of learners using the “More” button

We will be looking at the learner page and how to create a new learner in the learner page later on. Click on the link to access this content.



Newsfeed

On the right of the homepage you have the dashboard where as the Client Admin you will be adding news feed, videos, images and attachments for the learners to view and download.



Creating a New Post

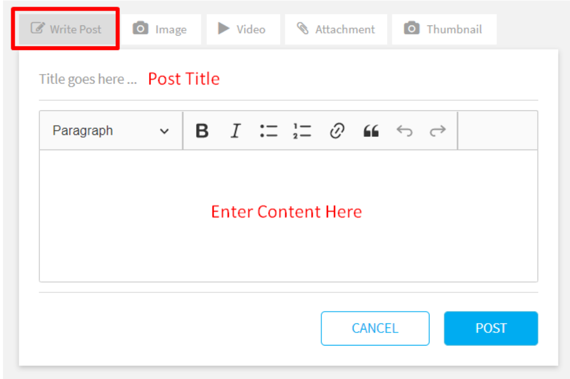
To create a new post you can click on the write post button on the top, this opens the create post dialog box as shown on the right, where you can add the Post Title and Content in the Text Area.

If you need to add an image you can click on the Image button and this will open your browser for you to select your image.

Similarly you can select videos and attachments from your computer too.

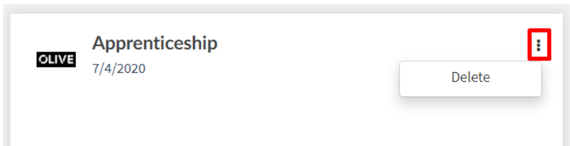
Thumbnail is used when the thumbnail that is auto generated once the video is uploaded is not the one you were looking for, you can upload your custom thumbnail here.

Once you are happy with the edits you can click on "Post" to post your content in the newsfeed.



Deleting a Post

Once a post has been created you can delete the post by clicking the 3 dots on the top right of the particular post as shown on the right and clicking delete.

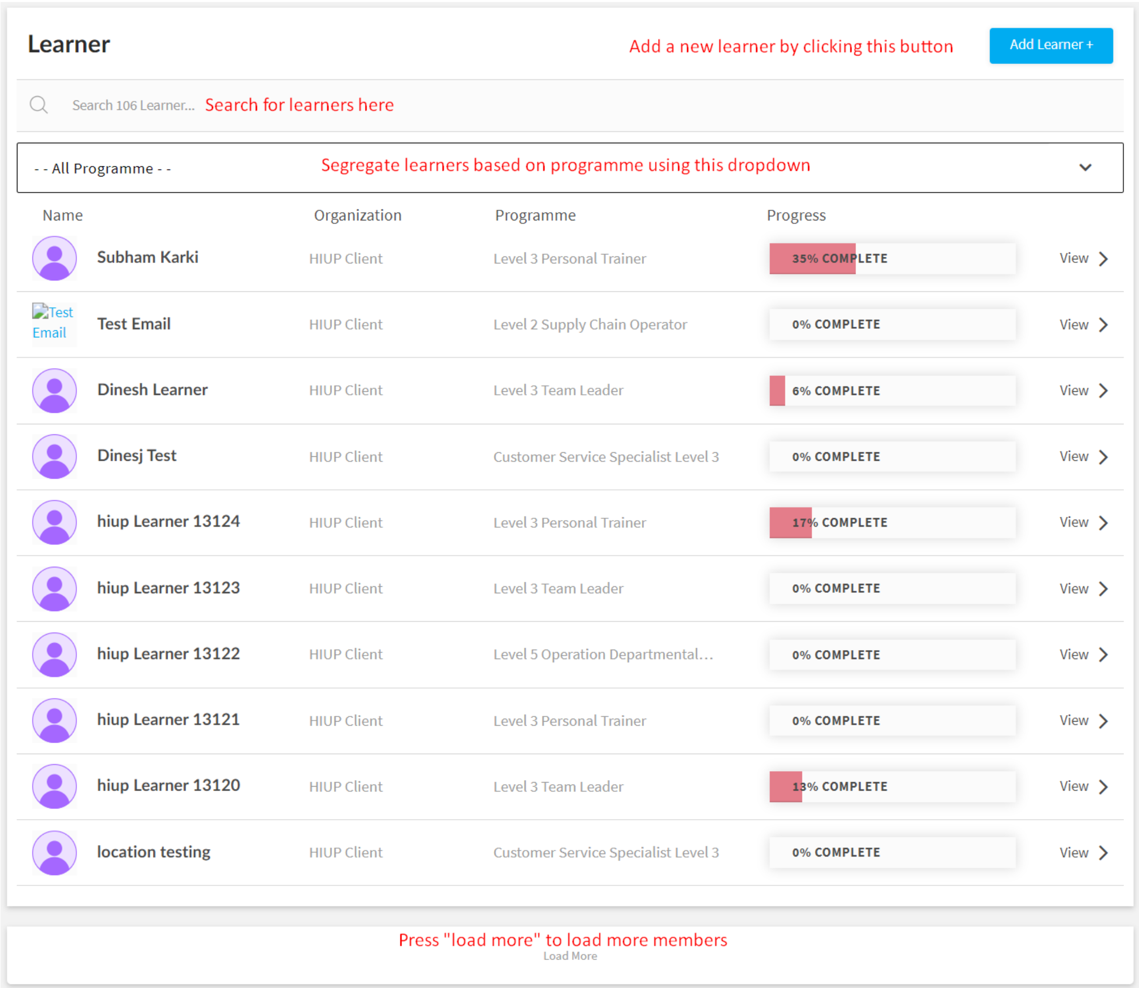


Navigation Banner

On the top you have your navigation banner where you can navigate to the Home Page, Learner Page, Programmes Page, Sessions Page, Journey Worker Rates Page, Reports, Messaging System and Account options.

Learner Section

You can access the learner section by clicking "**more**" in the Learner section in the home page or by clicking the "**Learner Tab**" on the Navigation banner and this will open the Learner window as shown below.



Here you can Create New learners, Search for learners, what programme a learner is doing, their current progress in the programme and view their individual progress in more detail by clicking on "**view**" beside the name of each learner.

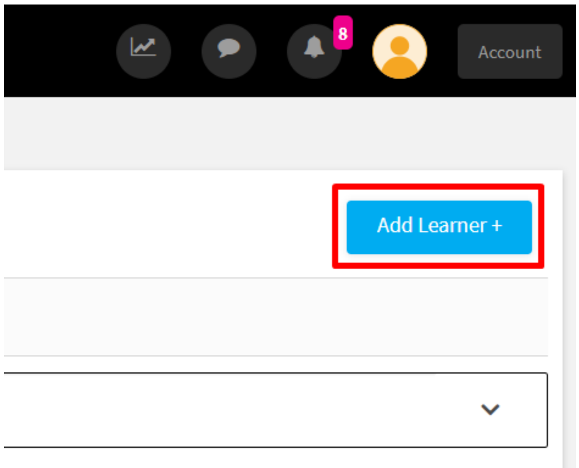
Learner Segregation

Client Admins will only be able to see learners in their organisations, for example if A is the Parent organisation and B and C are client organisations, Admin of A will be able to see all the learners of B and , but client admins of B and C can see only the learners in their respective organisations, B cannot see members of C and vice versa.

You can also filter learners based on the programme by clicking the **--All Programme--** drop down as shown below.

Add Learner

To Add a new learner you can click on the "+Add" button in the Learner section of the homepage or the "+Add Learner" button on the Learner page and it will open the learner creation page as shown below.



Add Learner

Upload the profile pic for the learner/apprentice here, clicking on the photo icon will open the upload option

PROGRAMME	Select a programme	Select the programme from the dropdown
EXISTING MEMBER	☐	
FIRST NAME	First Name	First Name of the Learner/Apprentice
LAST NAME	Last Name	Last Name of the Learner/Apprentice
EMAIL	Email	Learner or Apprentice's Email Address
GENDER	◉ Male ○ Female	Select the Gender of the Learner/Apprentice here
WEEKLY LEARNING HOURS	Weekly Learning Hours	Enter the learners weekly learning hours here
ASSESSOR	Assign the Assessor Here	+
VERIFIER	Assign the Verifier Here	+
ADDRESS	Sta Learner/Apprentice Address to be added here	

MOBILE	+44	Mobile — Learner Mobile Number
NATIONALITY	British	Select the Nationality of the Learner form the dropdown
DISABILITY	○ Yes ◉ No	If the learner has any disabilities, select the option here
EMPLOYMENT	Employment	Employment Status of the Apprentice/Learner to be added here
FURTHER NOTES	Further Notes	Any Further information regarding the learner needs to be added here

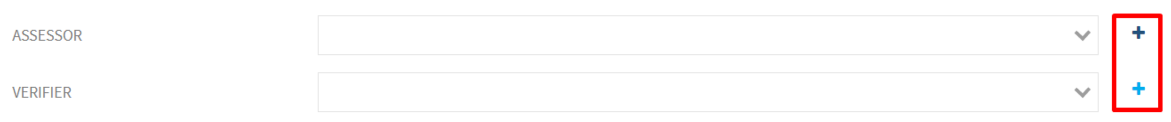
CANCEL SAVE

Learner Registration

Once the learner has been created a registration email is sent to the address that has been provided, the learner/apprentice will have to enter their information in order to log into the system.

Adding a New Assessor/Verifier

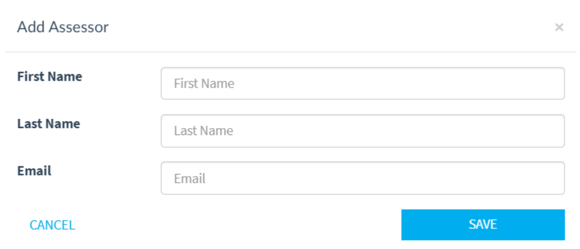
You can create a new assessor or verifier by clicking the corresponding "**+**" icon beside them as shown below.



This will open up the Assessor/Verifier creation page as shown on the right, where you can provide,

- First Name
- Last Name
- Email Address

Once the information has been added click on the "**Save**" button.



Assessor and Verifier Registration

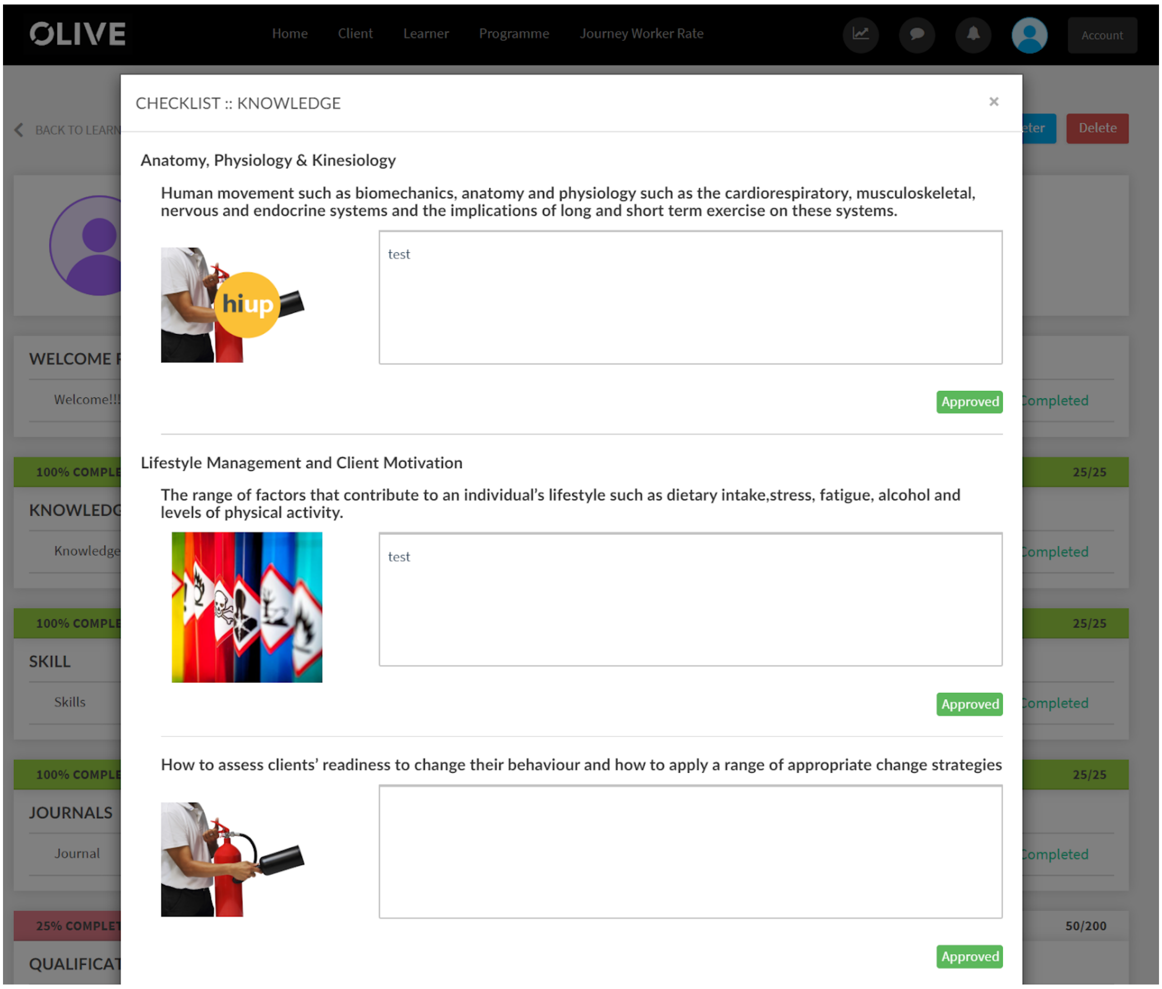
Once the Assessor or Verifier has been created a registration email is sent to the address that has been provided, the Assessor and verifier will have to enter their information in order to log into the system.

Viewing the student progress in detail

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.

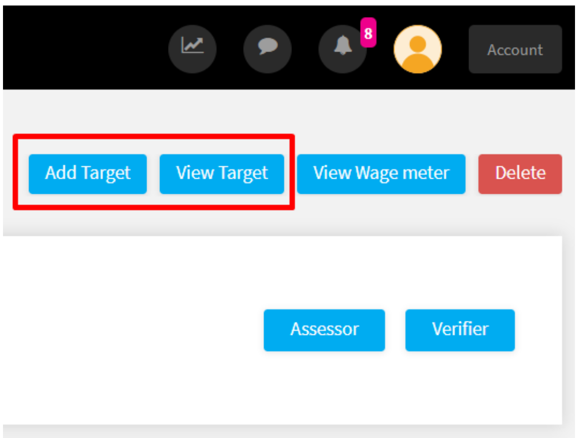
An Example has been shown below,



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

Adding and Viewing Targets

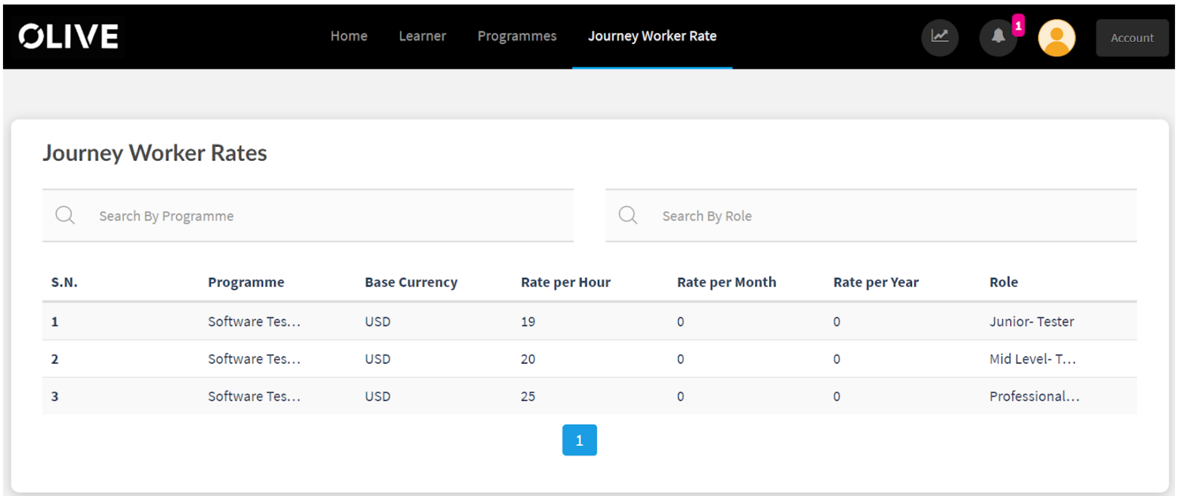
To know more about adding a target to a learner and view targets and comment and review them click on the link.



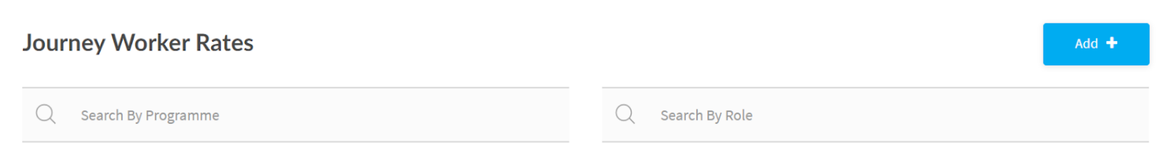
Journey Worker Rates

If there is a Journey Worker Rate associated with the Programme it can be viewed in the Journey Worker Rates tab on the Navigation banner as shown below,

This will take you to the Journey Worker Rate page that shows you the Rates and Roles for which the Rates are applicable to as shown below,



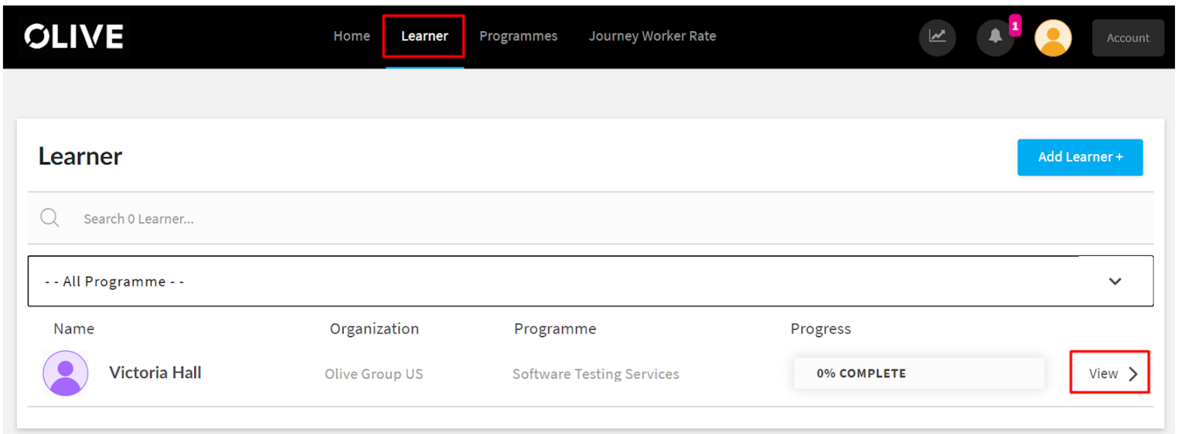
Here you can search for rates based on Programmes and Roles as shown below,



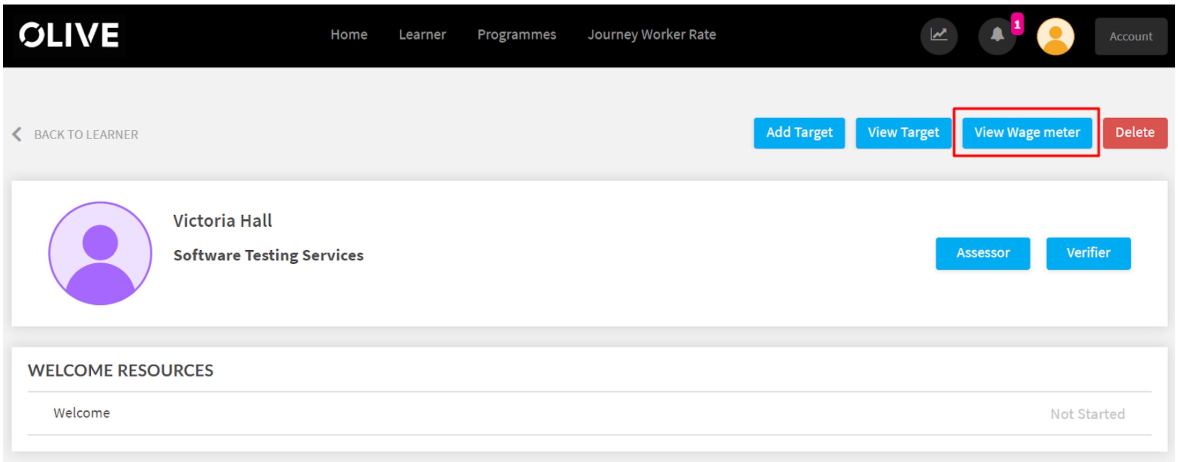
Adding Wages to an Apprentice

If a learner is applicable for a wage increase based on the Guidelines set by the Company on needs a raise this can be done using the Wages section for that particular Learner.

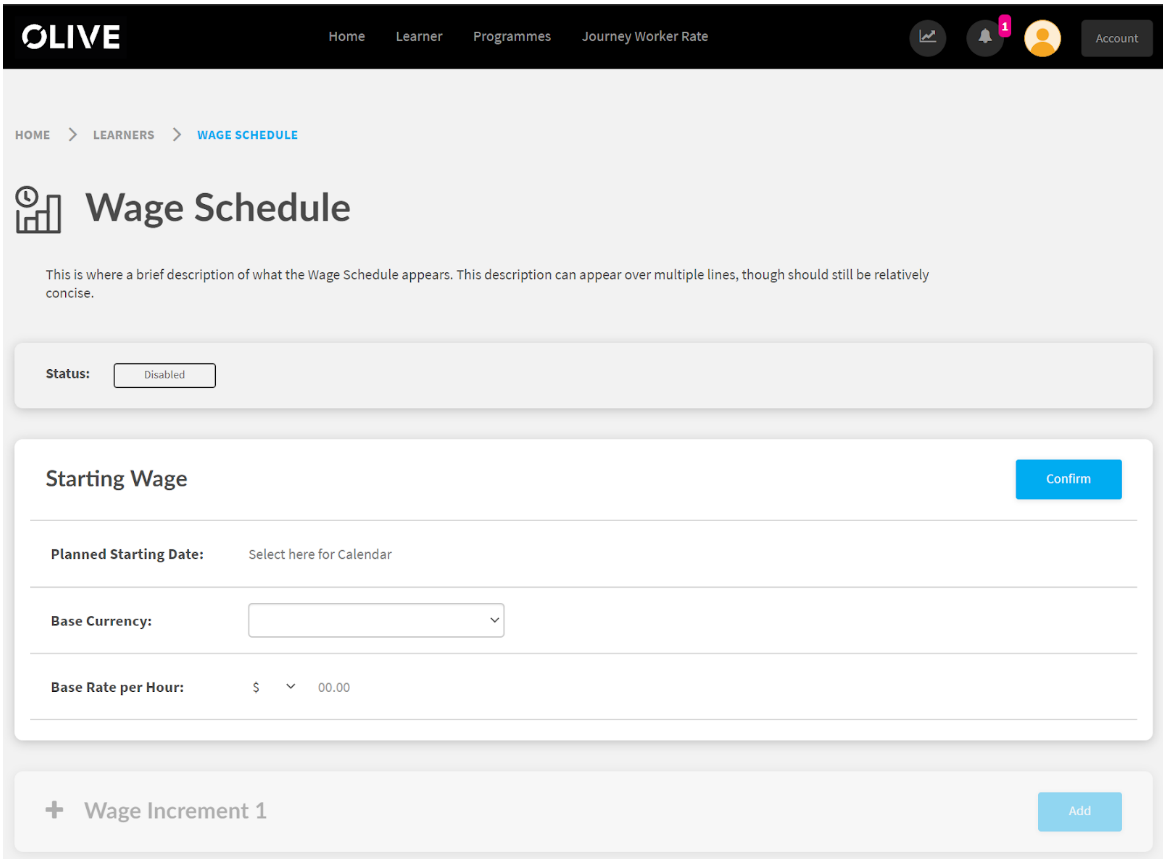
To Access the Wages Section, Navigate to the Learners page and Click on the "View" button beside the Learner Name.



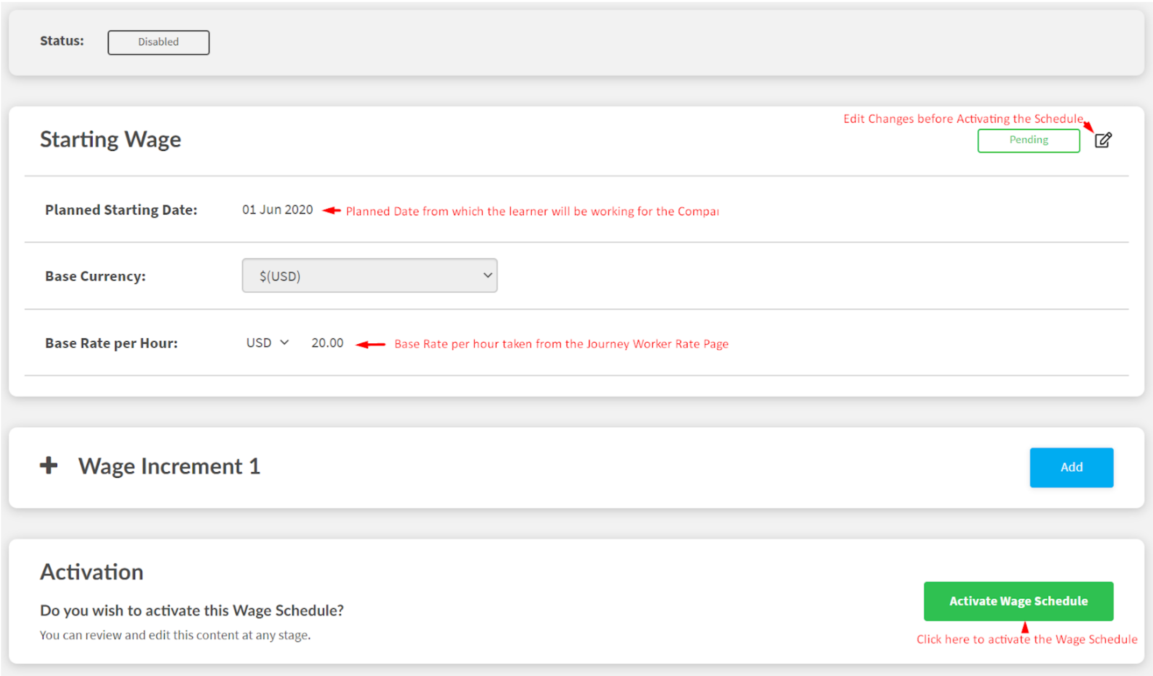
In the Learner view page, you can see the "View Wage Meter" button on the Top Right Corner as shown below



This will open the Wage Schedule Page for the Particular Learner as shown below,



By using the Journey Worker Rates page as a guide you can assign the Worker Rates for that particular Learner as shown below.

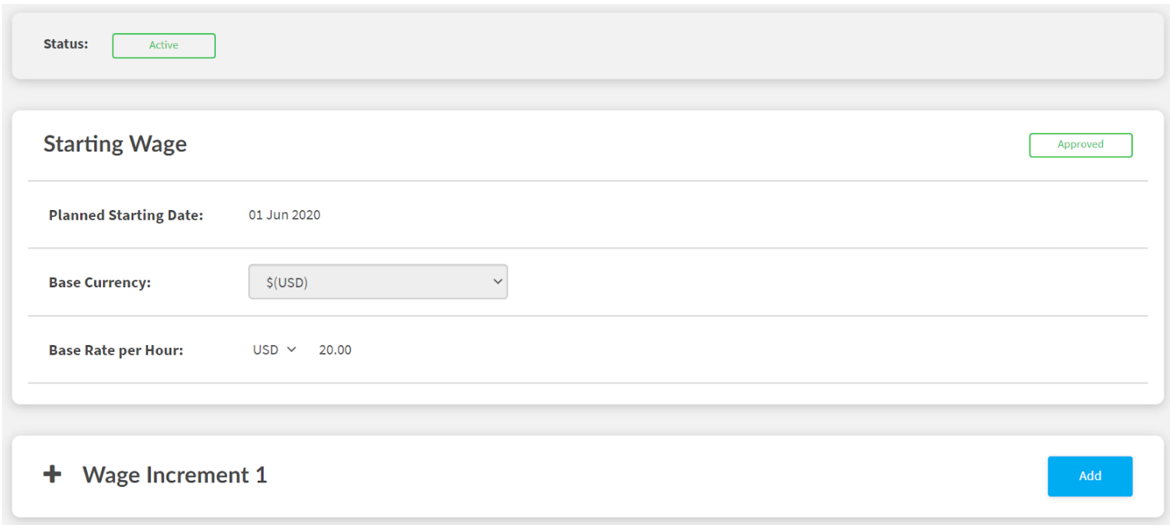


In the Planning Starting Date, the Client Admin can add the date from which the learner will be starting the Programme in the Company.

The Base Currency and Base Rate Per Hour can be taken from the Journey Worker Rate Page that has been set by the Admin.

To Edit the Schedule, you can click on the Edit button the Top Right of the Section.

Once you are happy with the details, you can click on the “Activate Wage Schedule” to Activate the Wage Schedule.

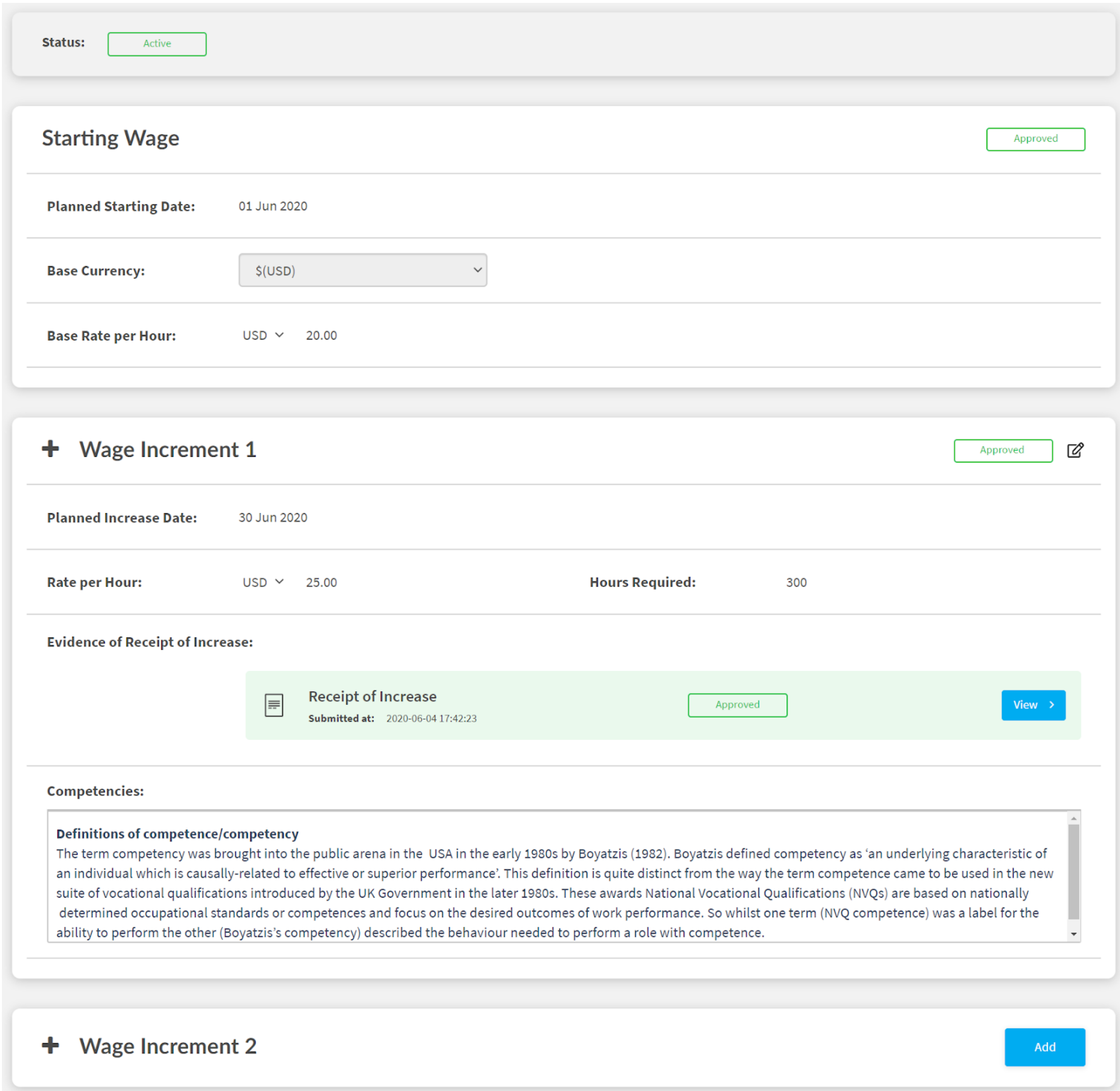


Once the Wage Schedule is Activated the Status will show as “Active” and the Starting Wage as “Approved”

Once the Journey Rate is Activated this cannot be edited, please make sure to double check the details before activating the Schedule.

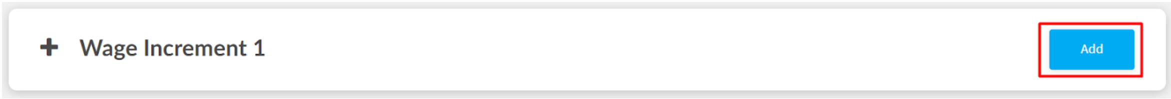
Wage Increments

Once a learner has shown the competency for a raise in the programme, the Client Admin or Assessor can add a wage increment for the learner.



Adding a Wage Increment

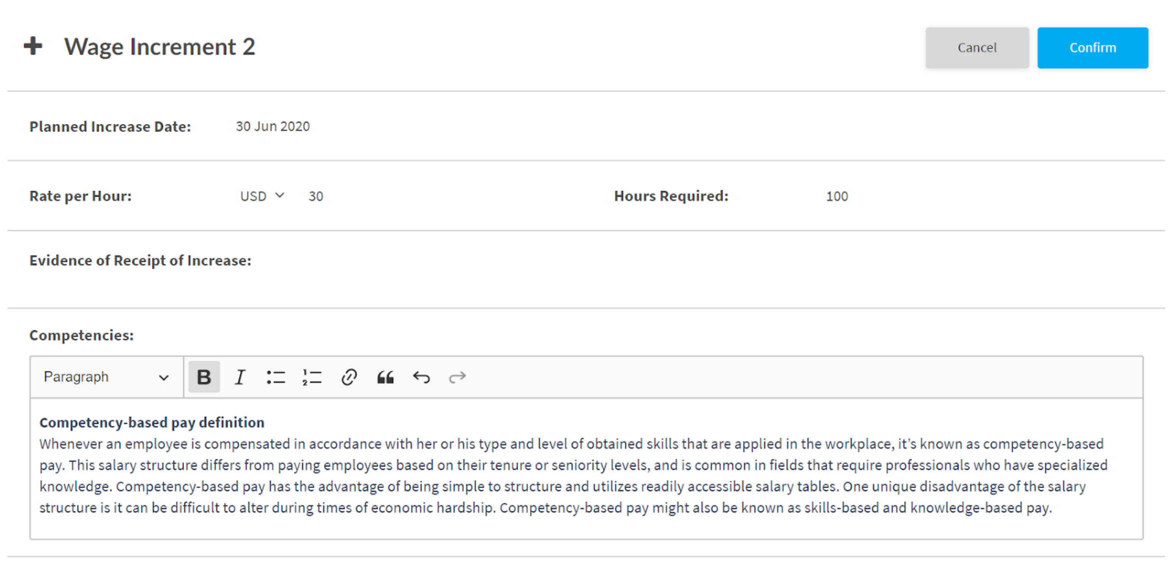
To add a Wage Increment, the Assessor and Client Admin can do this from the wage schedule page by clicking the "Add" button beside the Wage Increment as shown below



Here you can assign the date from which the Increment for the wage will start and the Rate at which the Rate is increased to. (This is a cumulative amount so if the Increment is 10$ the amount should be 20$ (Base Amount) + 10$ (Increment) = 30$

The Hours required is the amount of hours the Learner has to put in before the Increment can be applied.

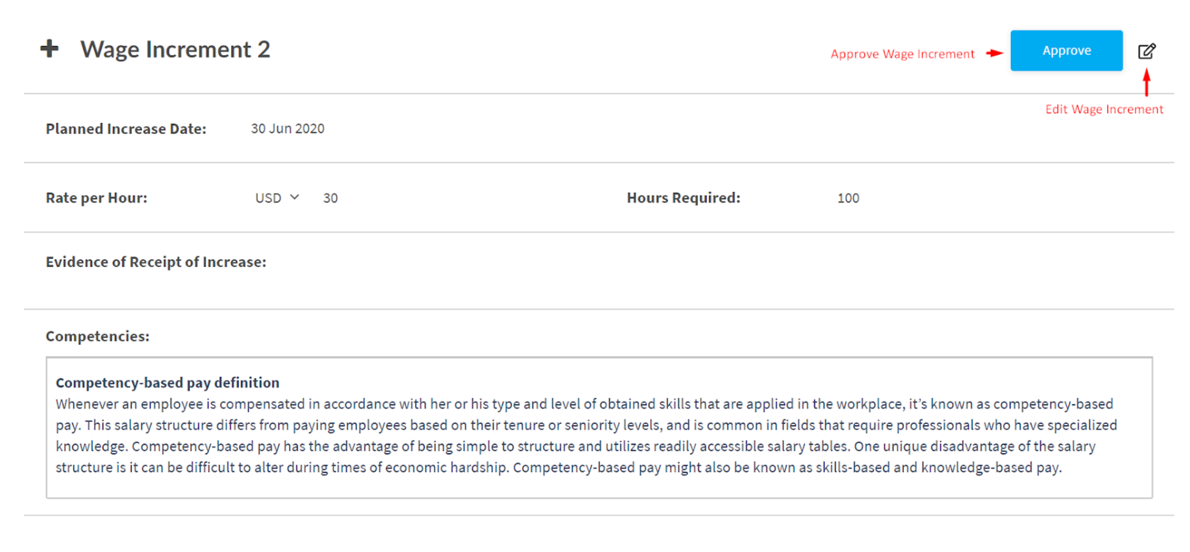
In the Competences Sector the Client Admin and Assessor can put in the criteria to meet the Wage Increment as well.

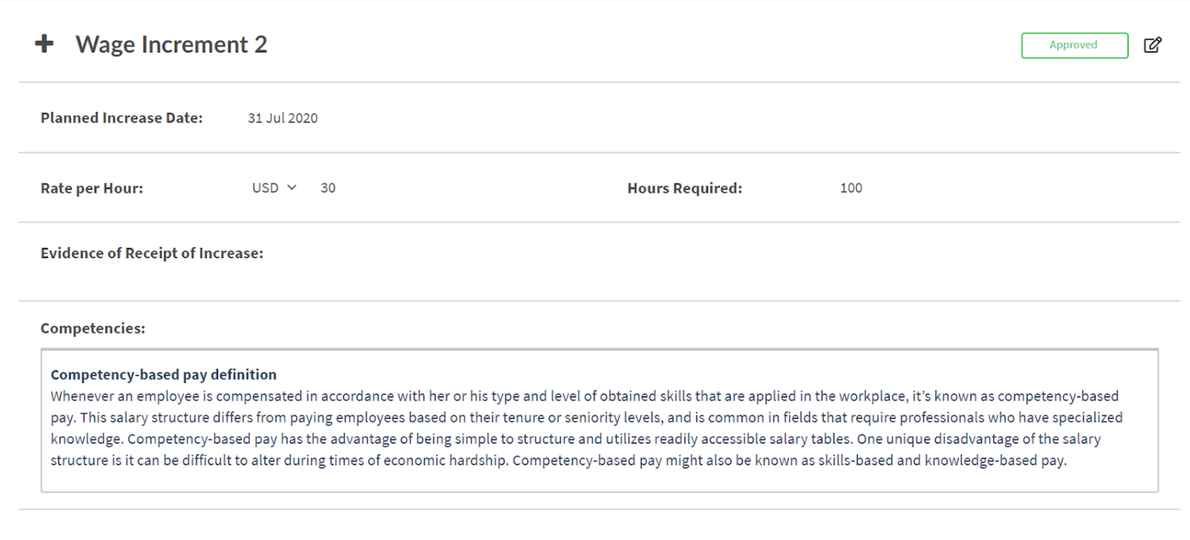


Once the Wage Increment details have been put in you can click on "Confirm" to apply the Wage Increment.

Approving the Wage Increment

Once the student/learner has successfully met the criteria for the Wage Increment the Assessor or the Client Admin can Approve the Wage Increment by clicking the "Approve" button or if there are any changes to the Increment, this can be edited using the "Edit" Button as shown below

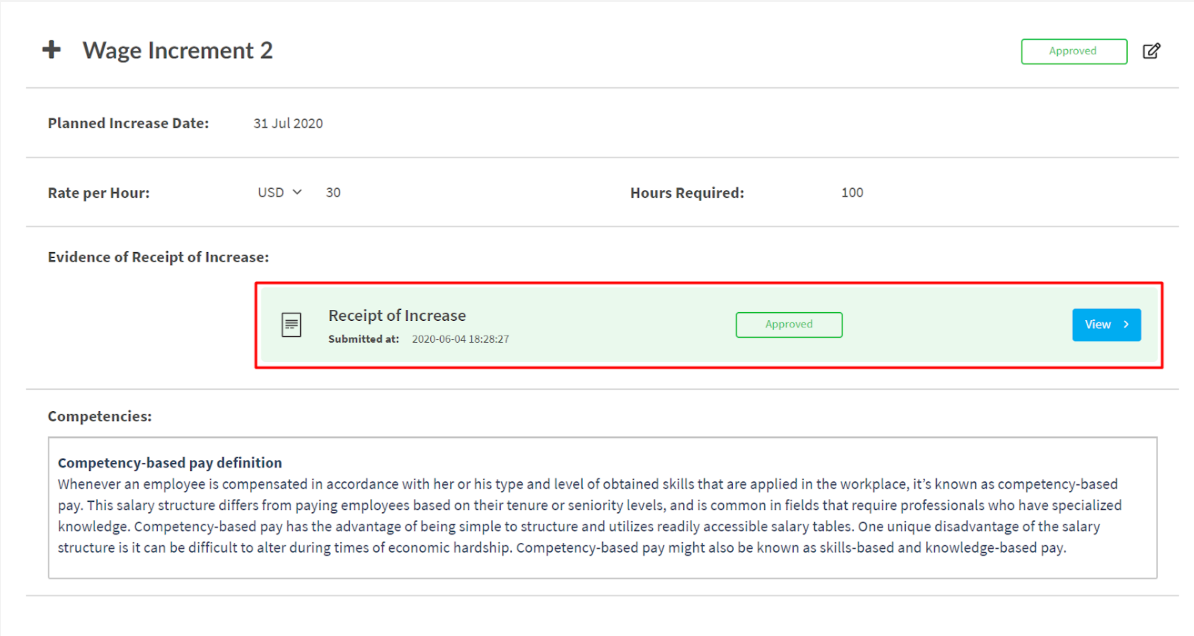




Once the Wage Increment has been approved, the student can then upload the Evidence of Receipt of Increase from the Students Page. Click here to see how.

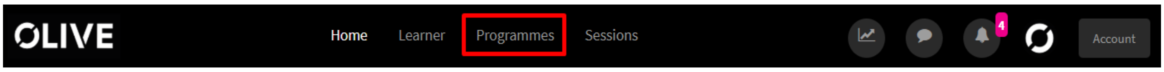
Approving the Receipt

Once the learner has uploaded the Receipt of Increment the Assessor will be able to approve the Receipt and will show in the system as shown below

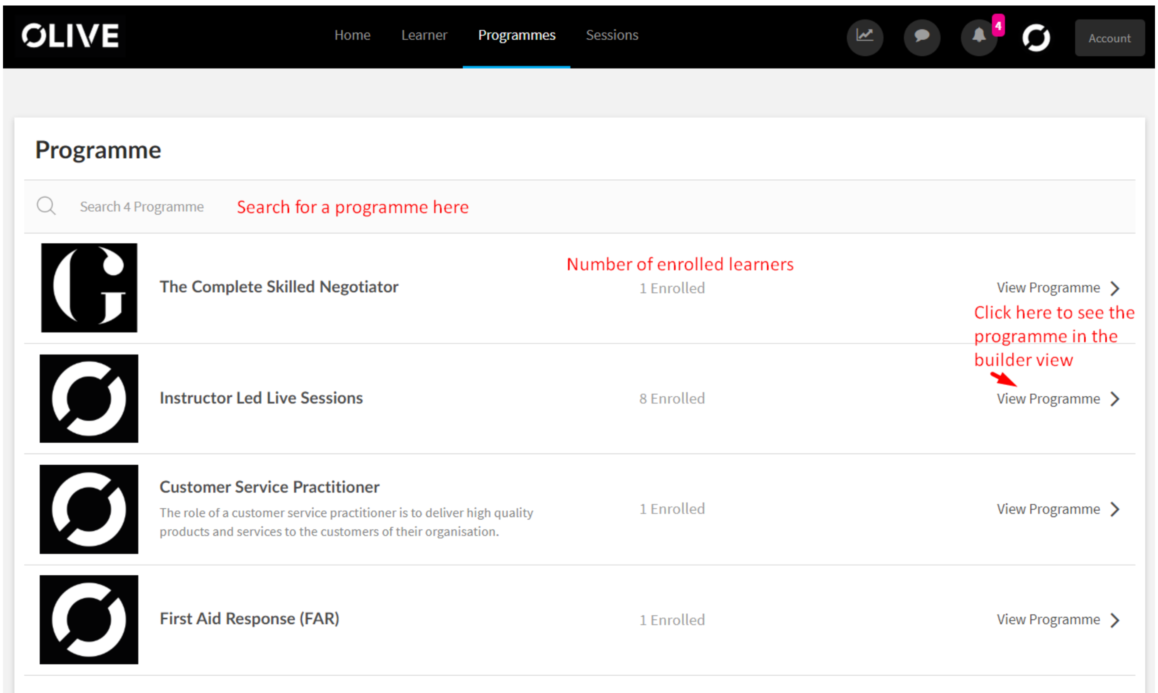


Programmes Section

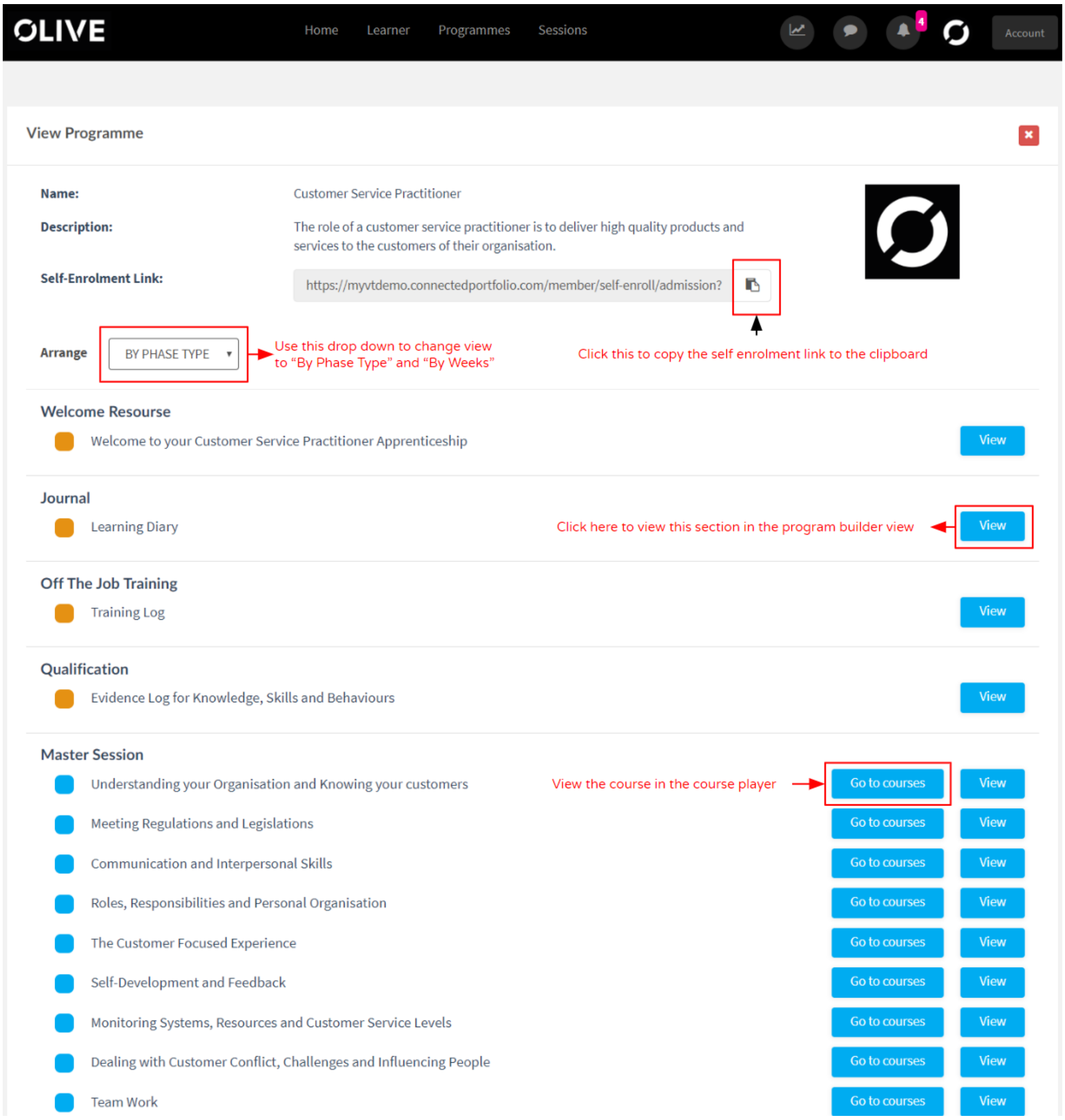
You can access the programmes section by clicking on "More" on the programmes section of the homepage or the "programmes' tab in the Navigation dashboard as shown below.



In the programmes section as the client admin you will be able to see all the programmes that have been added to the organisation from the parent organisation as shown below, you can view the program builder but will only have limited access to the program builder and see how many learners have been enrolled in each programme and search from a programme using the Search bar as shown below.



The following shows the expanded view of the programme from a "Client Admin" Perspective

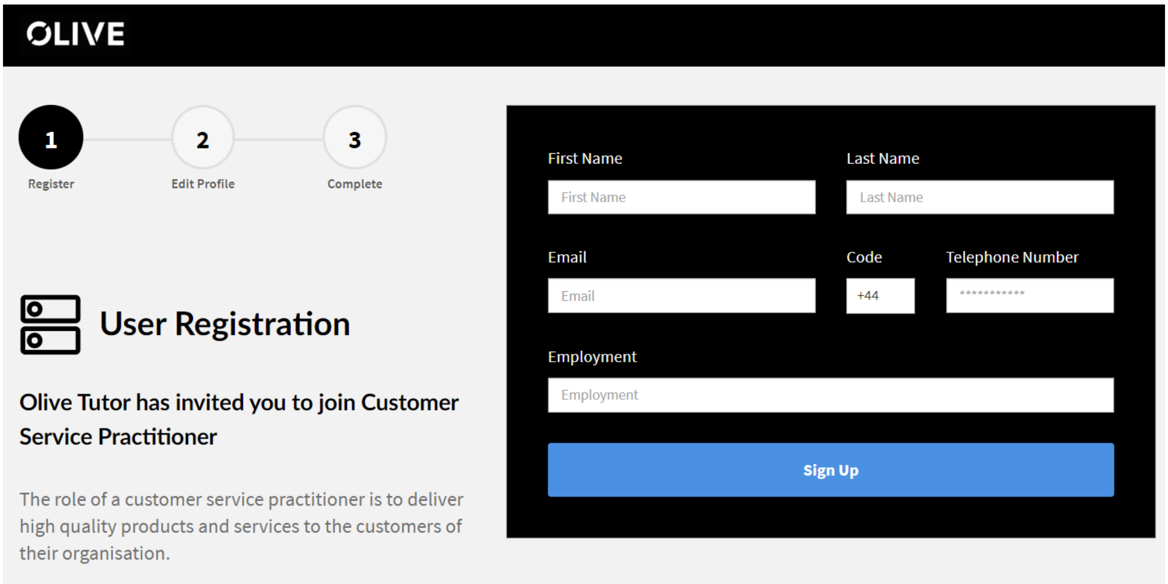


Self Enrolment Link

Client Admin can add learners by sending self enrolments links too, you can click the copy button beside the link in each programme to copy the link onto the clipboard. This can be then sent via mail or messaging systems to the learner for easy access.

Please note
This link can be accessed and if handled wrongly people who have the link and are not part of the programme will be able to create an account in the system.

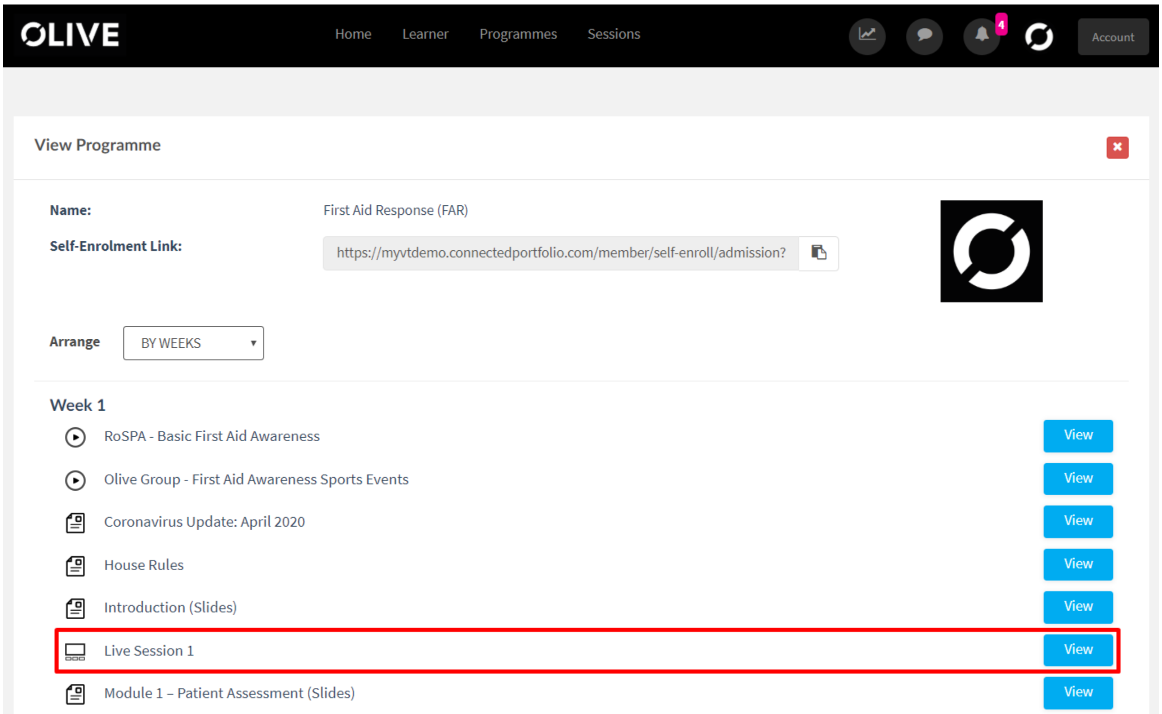
Once the learner clicks on the link they will get a page similar to the one below,



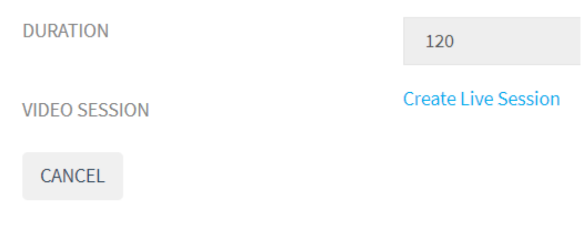
To see the learner registration process using the self-enrolment link, please click the link.

Creating a Live Session

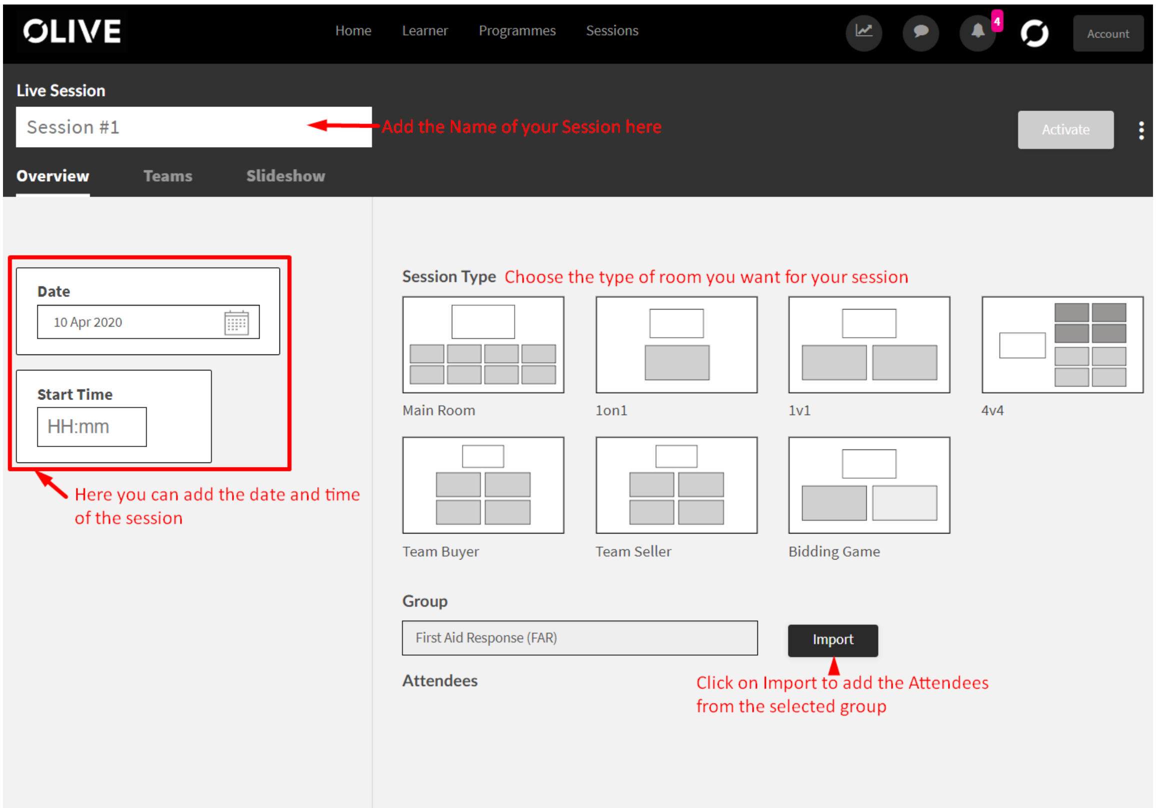
If the programme you are doing has live sessions you can go to that programme and click on view to get to the sections page as shown below and click on “View” beside the Live Session to access the Section.



At the bottom you will be able to see the option to create the live video session as shown on the right.



Clicking on the “**Create Live Session**” will open the Session Creator window as shown below,



To Import all the members of the group to the session click on the “**Import**” button. This will import the members as shown below.

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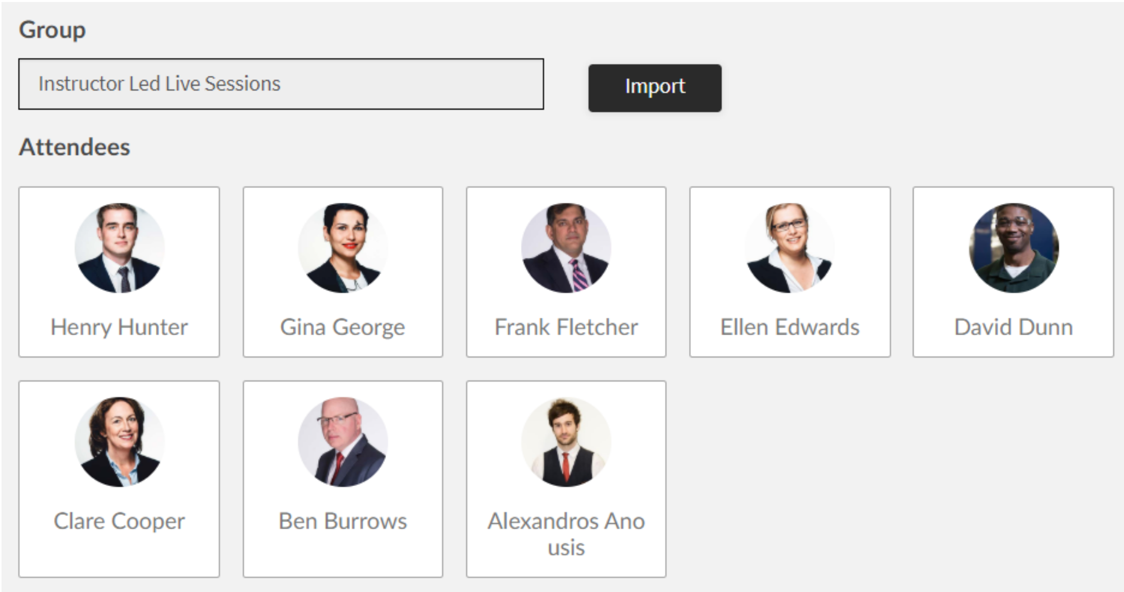
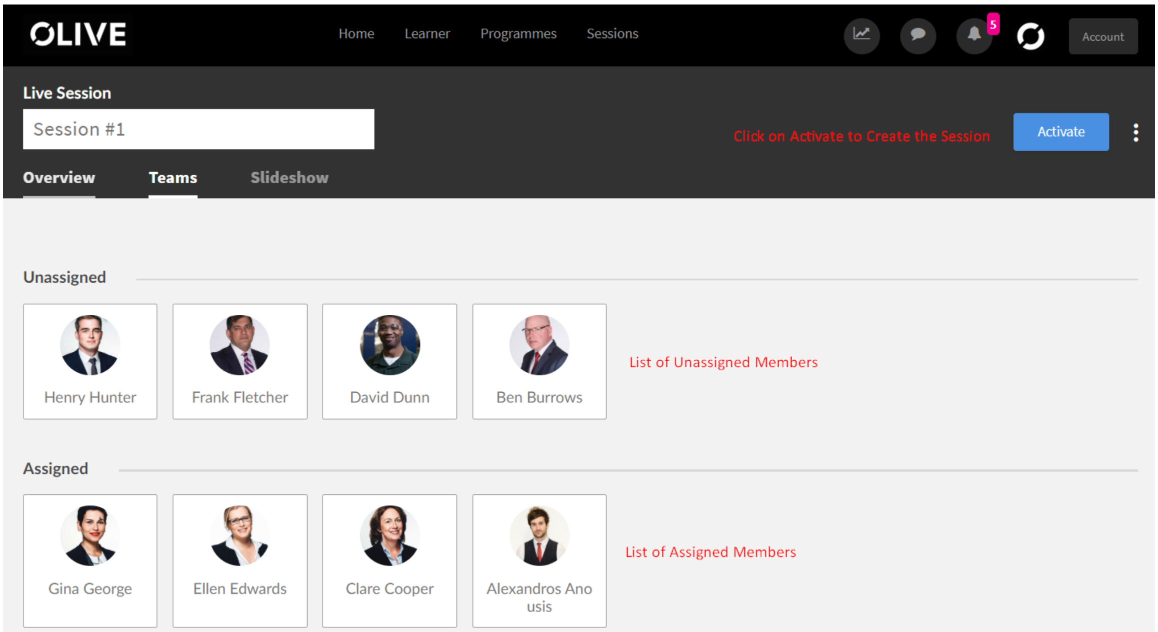


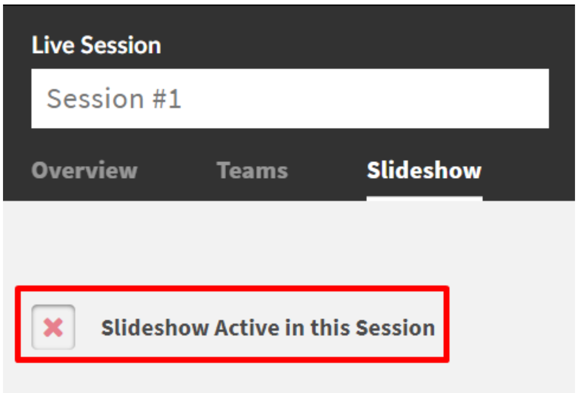
Teams

To choose specifically which members need to attend the session, you choose the members from the Teams tab. Here you can drag and drop the members from the Unassigned tab to the Assigned tab to add them to the Session.

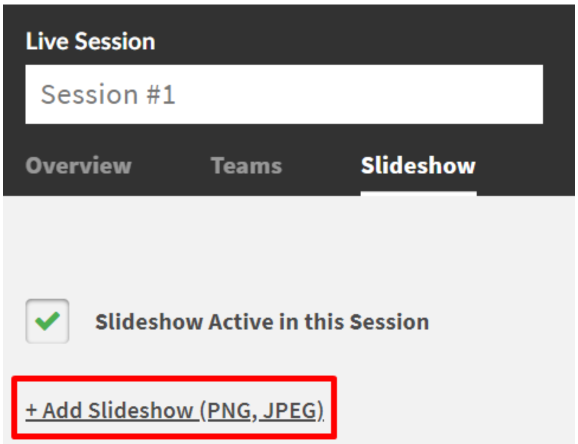


Slideshow

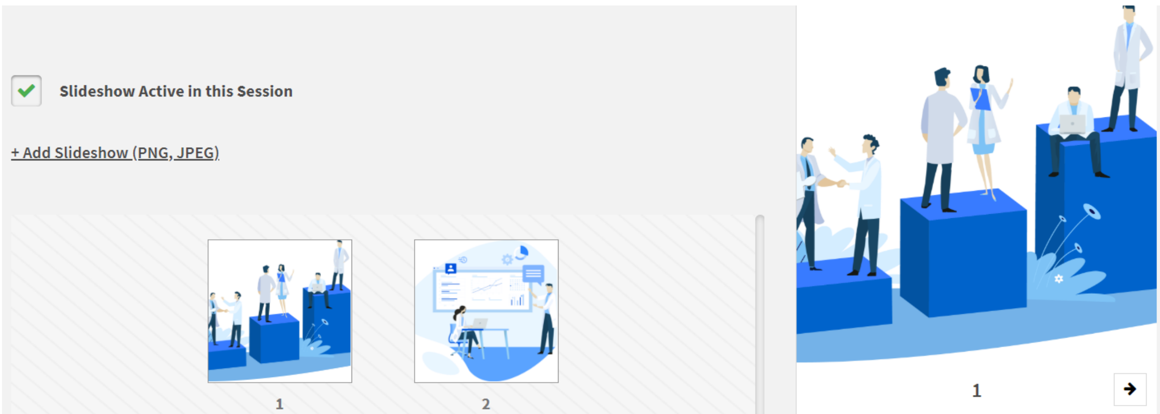
In the Slideshow page, you can enable and disable slide show by ticking the box as shown



Once the slideshow is active you have have option to upload your slides as shown



By Clicking the "**+Add Slideshow**" button it will allow you to upload PNG and JPEG files.



Once all the information has been added you can click on "**Activate**" and this will add the Live Session to the Calendar and Update all the Learner Calendar as well