e-qual
paperless portfolio

Awarding Body Manager guide

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The awarding body manager

The awarding body manager is an approved worker for the organisation who is able to view all the work that is carried out in all portfolios in centres assigned to that awarding body. The manager has the ability to view reports about users within E-qual and export them for distribution where appropriate.

Each awarding body manager has access to all of portfolios of all the centres that have been assigned to them. Each of these portfolios belongs to a candidate and contains all the work that the candidate and assessor between them have created to help meet the requirements of the qualification.

Each portfolio has a portfolio team. This can consist of any combination of assessor, trainee assessor, internal verifier, external verifier and expert witness advisor. Remember however, these roles could have different names in your portfolios. Each role name can be customised but their range of permissions and abilities in these roles remains the same.

Within each portfolio are various predefined areas containing relevant documents. These documents have been attached by the candidate or assessor and then commented on. The resulting portfolio of evidence can be accessed, reviewed and sampled at any time by the other members of the portfolio team.

The sections below describe each of the areas of the portfolio that can be accessed in the awarding body manager role and how to use them. Online help is also available in the software itself by clicking the **View Help** button at the top right of each page.

Login

To login to E-qual Paperless Portfolio, enter your username and password into the relevant boxes and click on the **Login** button.

If you cannot remember your username or password, click on the **Forgotten Username or Password** link. This will take you to a page where you can enter the email address that you have in your E-qual account. Your login details will be emailed to this address.

If you require further help with your login to E-qual, contact your administrator.

Select role

It is possible, within your E-qual account, to work with more than one role. If you have 2 or more roles assigned to you, you can use this page to select which of your roles you wish to login as.

In this case we are logging in as the awarding body manager role, so click the **Select** button next to Awarding Body Manager.

If you wish to return to this screen to login using an alternative role, click on the **Change my role** link at the top right of any screen.

Awarding Body Manager Menu

This screen gives you access to your areas of E-qual.

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

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

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

View Portfolios

This page allows you to access details about portfolio owners in centres assigned to you and lets you gain access to their portfolios.

You first need to select which of your assigned centres you would like to look at. Select a centre from the dropdown menu. Initially, all candidates in that centre are displayed with various details about them.

You can filter these candidates to show only candidates fulfilling certain criteria. For example, you can view only the candidates for a certain external verifier by selecting that EV from the External Verifier dropdown. Only candidates who have that EV allocated to their portfolio will then be visible. You can further filter by selecting more criteria from the dropdown menus.

You can change the order in which the candidates are displayed on the page by clicking on the column titles. For example, you can change the order of the displayed candidates using the Portfolio Progress column. The candidates can be ordered by ascending or descending percentages by clicking the column title.

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

Viewing portfolios

As a manager you are able to view the portfolios of all candidates in the centres you are assigned to.

The sections below describe each of the areas of the portfolio that you can access. Online help is also available in the software itself by clicking the **View Help** button at the top right of each page.

Portfolio menu

This menu screen gives you access to all areas of the portfolio. To visit a particular area of the portfolio click the relevant menu button.

At the bottom of the menu screen are the details of the Portfolio Team. These are the people who are working on this portfolio.

Just above the portfolio team area is the percentage complete figure. This is the amount of the portfolio that has been locked by the assessor(s) and is considered 'finished'.

To the right of the page is the discussion area. See *Discussions* for help with using this feature.

To return to the View portfolios page, click **Exit this portfolio** in the top menu bar or the **Exit portfolio** button.

Discussions

The Portfolio menu contains a Discussions area. This is where you can read discussions between users of the portfolio. The Discussions area is also accessible from each page of the portfolio using the **Discussions** button in the Tools panel.

At the top of the discussions area is a dropdown menu containing a list of all the discussions you can read. Click on the menu and select the discussion you would like to read.

Planning

This area is used by the assessor to select the parts of a qualification to be undertaken by the candidate and as a place to store assessment planning documentation. The page contains an area to add planning documents to the left and the standard for the qualification, as a tree structure, to the right.

A file can be viewed by selecting the filename in the **Attached planning documents** area and clicking the **Open file** button.

Assessors can lock documents, to prevent them from being removed, if they are considered to be suitable for inclusion in the final portfolio. Locked documents cannot be removed from the portfolio.

The qualification the candidate is attempting is represented as a tree structure. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes. Clicking on node text selects that statement, indicated by a highlight around the statement. Each node also contains an area for the assessor to enter a start date, a proposed completion date and an actual completion date.

Start Date is a date when work on the particular statement will start.

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

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

The selected tick box (**SEL**) allows the assessor to choose which parts of the qualification structure the candidate should attempt. Any statements selected here will become visible and available to attach evidence to in the Portfolio Evidence area.

The Tools area at the bottom of the page gives you access to your discussions. Click the **Discussions** button to open them in a popup window. See *Discussions* for help with using this feature.

General Documents

This area is designed to contain general documents that are part of the portfolio but not necessarily documents that contribute to the main qualification structure. They could be documents that contain details about the candidate, items such as a CV or certificates, or general portfolio administration documents and induction documentation.

A file can be viewed by selecting the filename in the **Attached general documents** area and clicking the **Open file** button.

Assessors can lock documents, to prevent them from being removed, if they are considered to be suitable for inclusion in the final portfolio. Locked documents cannot be removed from the portfolio.

The Tools area at the bottom of the page gives you access to your discussions. Click the **Discussions** button to open them in a popup window. See *Discussions* for help with using this feature.

Portfolio Evidence

This page is the main area of the portfolio, used to attach evidence and comments to the appropriate parts of the qualification structure.

The standard for the qualification is shown on the left in a tree structure. The tree only contains the parts of the qualification that have been selected in the Planning area. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes.

Alongside each branch of the tree there may be several icons displayed. These are intended to provide information about the status of the node.

The small document icon indicates that there is evidence attached to that statement.

The small bubble icon indicates that a comment has been attached to that statement.

The padlock icon indicates whether a node has been locked. A node can be locked to prevent changes to the attached items if the documents and comments are satisfactory to complete that part of the qualification. When a node has been completed the padlock becomes a 'Completed' icon

To the right of the tree is the **Documents attached to selected node** area and the **Comments attached to selected node** area. This is where documents and comments are added and displayed as part of the completed portfolio.

A file can be viewed by selecting the filename in the **Documents attached to selected node** area and clicking the **Open file** button.

The Tools area at the bottom of the page contains buttons to access useful additional tools.

Click the **Discussions** button to open the Discussions area in a popup window. See *Discussions* for help with using this feature.

You can see a tabular view of the evidence and comments and where they have been attached by clicking the **Matrix** button. See *Matrix* for help with using this.

Matrix

The matrix is a tabular representation of where documents and comments are attached to the qualification structure.

The qualification structure is represented as a tree diagram showing two levels at a time - the nodes you are wanting to show documents for, and their parent node. The matrix always opens at the top level of the qualification structure. That is, showing the short name of the qualification as the parent node and then the collection of child nodes below.

Down the left of the matrix is a list of all documents that are attached at that level of the qualification structure and any levels below. The matrix then shows, by a number of symbols, where each document has been attached.

The tick indicates that the document has been attached at this node in the qualification structure.

The arrow indicates that the document has been attached at a lower level - a child node of the current node - in the qualification structure

The tick and arrow indicates that the document has been attached at this node of the qualification structure and has also been attached at a lower level - a child node of the current node - in the qualification structure.

Each document listed in the matrix can be opened in its native application by clicking on the document name.

The Comments section of the matrix indicates any comments that have been added at these nodes. Their position in the qualification structure is indicated by a small speech bubble icon in the column of the node they are attached to. Move your mouse over the comment to read the full text.

To navigate up or down the levels of the qualification structure, simply click on the **Up** or **Down** buttons. Alternatively, you can use the 'You are here' links at the top of the matrix to move back up through the levels.

You can print the matrix for easy reference.

Completion

The Completion page is used for indicating which areas of the qualification have been completed. The nodes of the qualification structure that require marking as complete are displayed in a tree structure. When a member of the portfolio team is able to make a completion decision on a node, they tick the box under their role name. A date will be displayed next to the tick box and that node is considered Complete.

Once a node has been marked as Completed by the first person in the sequence, that node is locked on the Portfolio Evidence page and the Completion icon is displayed against the nodes and attached documents. Documents and comments cannot be added, removed or edited on that node.

Once the whole qualification has been Completed, all documents in all areas of the portfolio are locked.