Pearson

Managers Guide

ePortfolio

Version 06.16
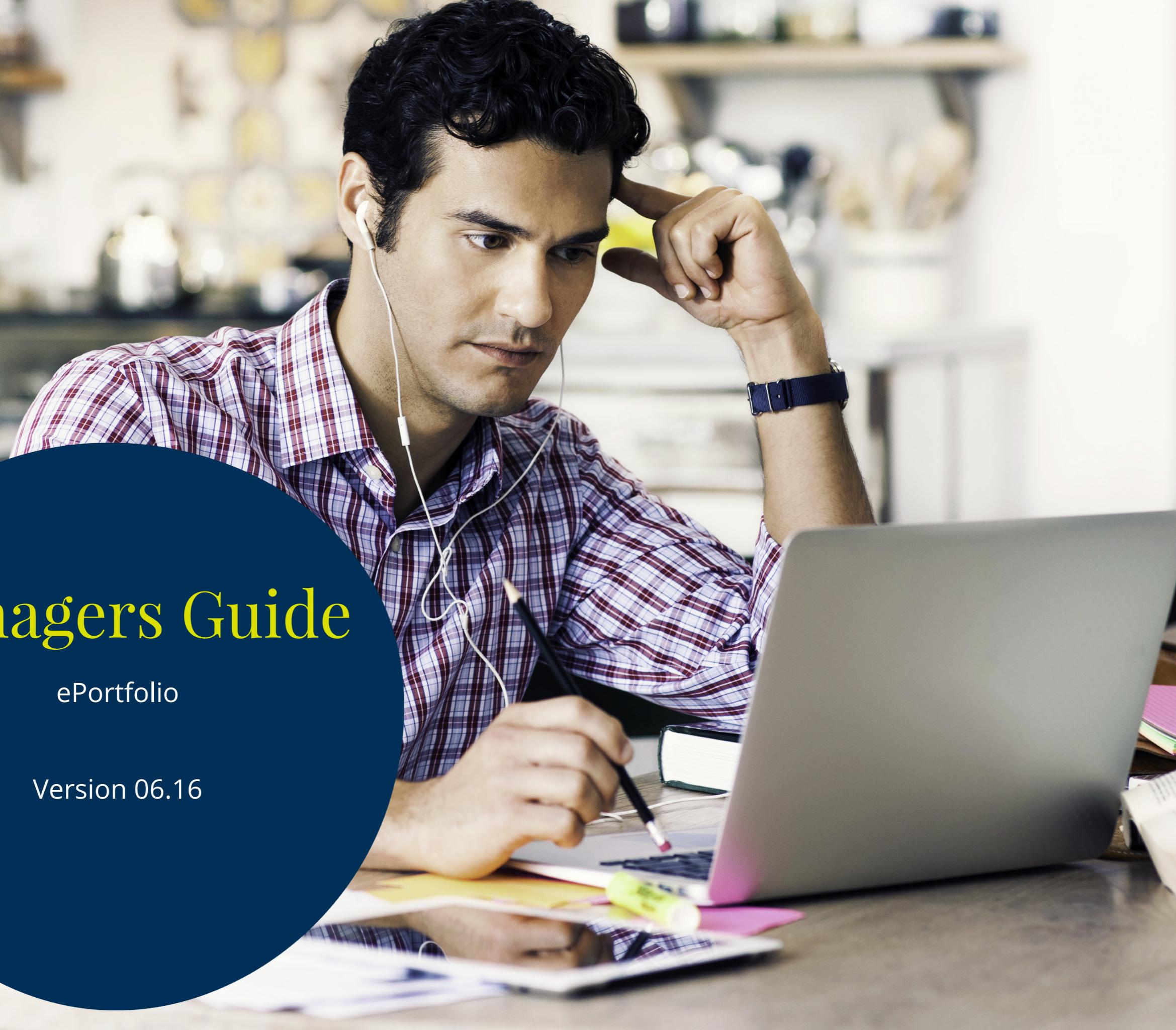
About this guide

The purpose of this guide is to provide 'Managers' with instructions on how to access and navigate ePortfolio.

ePortfolio has been designed to offer different levels of permission. To login, you will require a username and password.

Please ensure that you have individual accounts for each user of ePortfolio as this will assist in audit tracking and increase the security of learner data. 'Centre Administrators' will be provided with a unique password.

Each centre will need to identify which staff will be using ePortfolio and the levels of permissions they will require depending on their role (Assessor / Internal Verifier etc). They will then also have unique passwords provided.

Please do not disclose your password to anyone.

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Centres are required under the terms of their registration under the Data Protection Act to ensure that data subjects are aware of what will be done with the personal data that they supply. This can be done through a privacy notice - please see the relevant guidance available on the Information Commissioners website. The Data Protection Act further stipulates that centres must obtain the explicit consent of a data subject if personal sensitive data is to be collected.

Pearson may require that a centre shows the information supplied to data subjects regarding the use of their data and any relevant privacy notices. Failure to have this information available to Pearson may result in suspension of Pearson approval. Pearson also requires that centres stipulate in their privacy notices that Pearson may process personal and sensitive data to enable us to do the below:

- Fulfill our obligations under the terms of a centres approval
- Provide centres with up to date information on Pearson qualifications
- Approve centre staff for qualifications
- Provide personal and sensitive data to regulatory authorities as required in terms of our registration under the Data Protection Act
- Process requests for Particular Assessment Requirements (PAR)
- Contact learners directly as may be required during a quality auditor visit to ensure compliance with the relevant regulatory codes of practise

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System requirements

This section of the guide will outline the system requirements needed to run ePortfolio.

ePortfolio will operate, although a little slower, with a lower specification however, the preferred system requirements are as shown below:

Operating system: Windows Platform

Browser: Internet Explorer 8, Google Chrome, Firefox 3.0 (or above). IE8 is recommended.

Screen Resolution: 1024 * 768 (or above). 1280 * 1024 is recommended.

Client Software: Adobe Flashplayer 10 (or above) and Javascript enabled.

Internet Connection: 1MBPS broadband minimum

Firewall and Proxy Servers: If you are running any type of Firewall or Proxy Server, please allow the following IP Addresses:

- 159.182.72.228

Port 80 (http port) and 443 (SSL port) need to be configured to allow the Pearson web address below:

- https://pqs.pearson.com
- https://pqs.pearson.com/eportfolio

ePortfolio Explained

Section Overview

This part of the guide will show you how to login to the ePortfolio system and how to navigate around the homepage as a Manager.

It will also explain what each of the menu functions allows you to do as a user and what all of the icons represent.

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ePortfolio Login

This part of the guide shows you how to login to ePortfolio.

To Begin, Go To:

Step 1

Enter your username and password. Then select 'Login'.

Please note, users will be prompted to change their password the first time they log in to the system.

Password and Account Protection:

Users must have their own username and password. These details should not be generic or shared with other learner(s) and / or colleagues. To prevent compromise or unauthorised exposure to the system, users must inform their Account Specialist or their Centre Administrator if they believe or suspect another user may be accessing the system without authorisation.

ePortfolio Homepage

This part of the guide shows you how to navigate around the ePortfolio homepage under Manager access.

To Begin: **Login to ePortfolio**

Step 1

Once you have successfully logged in to ePortfolio as the Manager, the homepage will be displayed, as shown below.

Managers are able to access a range of features from the home screen. These are: Messages, Tasks, Overview and Timeline. The overview allows the Manager to view a list of learners they are assigned to by their Centre Administrator. Beside each learner is a breakdown of their program of study / assigned qualifications.

You are also able to use the icons located at the top of the screen as well as the drop down menu at top left of the screen. These are explained further under 'ePortfolio Icons'.

This part of the guide explains the functionality of the drop down menu at top left of home screen in further detail.

To Begin, Click: **Menu**

Home

Will return you to the homepage

News

Displays the latest Pearson news articles

Help Articles

Loads the Pearson ePortfolio support materials and query submission form

Account

Tasks

Displays any outstanding tasks you've set and where applicable, will allow you to create tasks

My Tasks

Displays any outstanding tasks you have to complete

User Details

Allows the Centre Administrator to modify their personal user information

Logout

Securely logs the user out of ePortfolio

ePortfolio

Learners

Displays the learners linked via qualification to the selected assessor

Un-assessed Evidence

Displays a list of un-assessed evidence

Support Materials

Allows the assessor to view assigned support materials (e.g. internal policies and procedures)

Programme Details

Will allow the assessor to view a list of products and associated content assigned to them by their Centre Administrators

Messages

Will display your inbox and sent items within ePortfolio

Reports

Allows you to generate reports for statistic data

ePortfolio Icons

This part of the guide explains the functionality of each icon in more detail.

The Home icon will return you to the homepage regardless of where you are in the system.

The Message icon will show all messages sent by or to you.

The Task icon will show a list of tasks that you have outstanding. You can also view any completed tasks.

The Help icon will direct you to a page where you will be able to access online FAQ's as well as web form to submit queries directly to Pearson Account Services.

The Role Selection button will allow users with multiple roles to switch to another role.

The Logout icon will securely log you out of ePortfolio.

Learner Progress Explained

Section Overview

This section explains how to view learner progress against the programme of study / qualifications.

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Learner Progress Explained

From the homepage, select the learner whose progress you would like to view.

By hovering over the 'progress bar' in the centre of the page, the information shown at right will be displayed.

What's achieved

Is the percentage of the qualification / assessment criteria that have been completed (has weightings / contributions of 10 or more)

What's working on

Is the percentage of the qualification / assessment criteria that have contributions but do not equate to 10 or more

What's left to achieve

Is the percentage of the qualification that has no weightings / contributions to any of the assessment criteria or that does not equate to 10 or more (a combined total of 'What's working on' and 'What's left to achieve'.

To view the learners progress in more detail, select 'learner progress' from the menu at left.

The progress bar at top of the page displays the overall progress of a particular qualification.

Towards the bottom of the page, a breakdown of the qualification can be viewed displaying individual units and their overall progress.
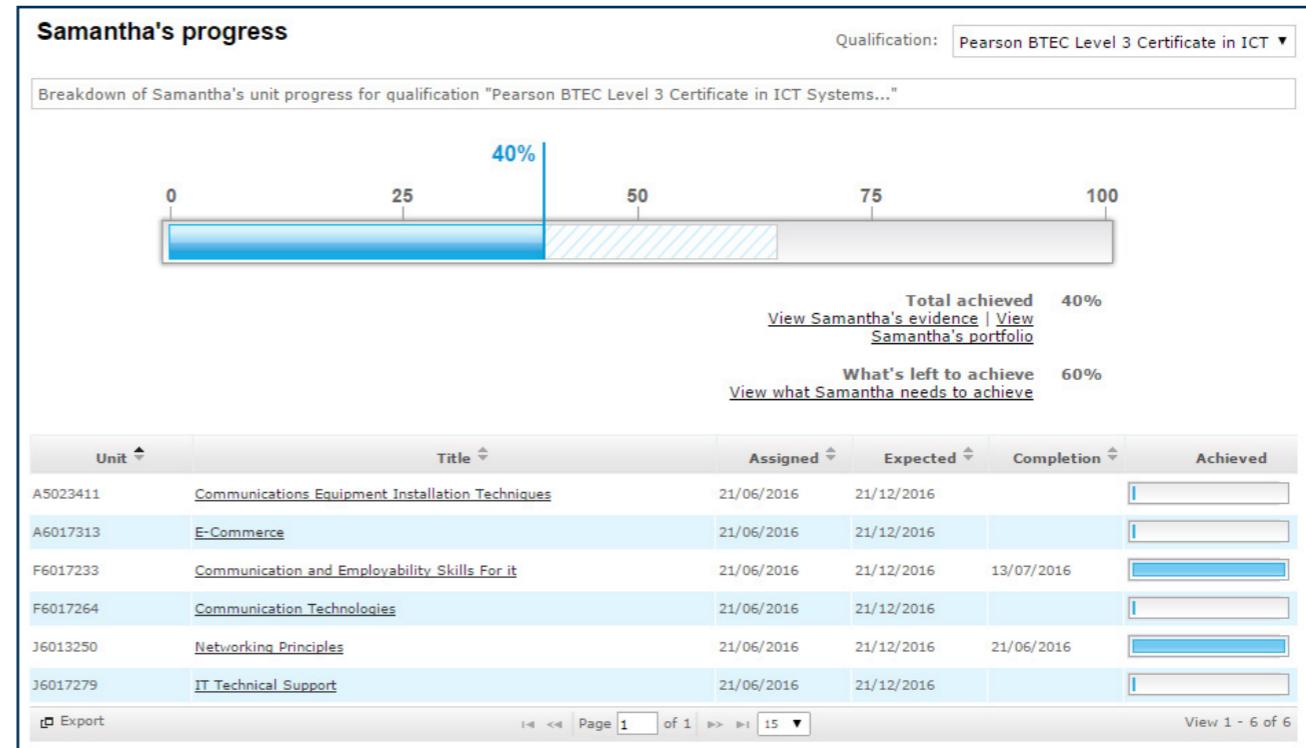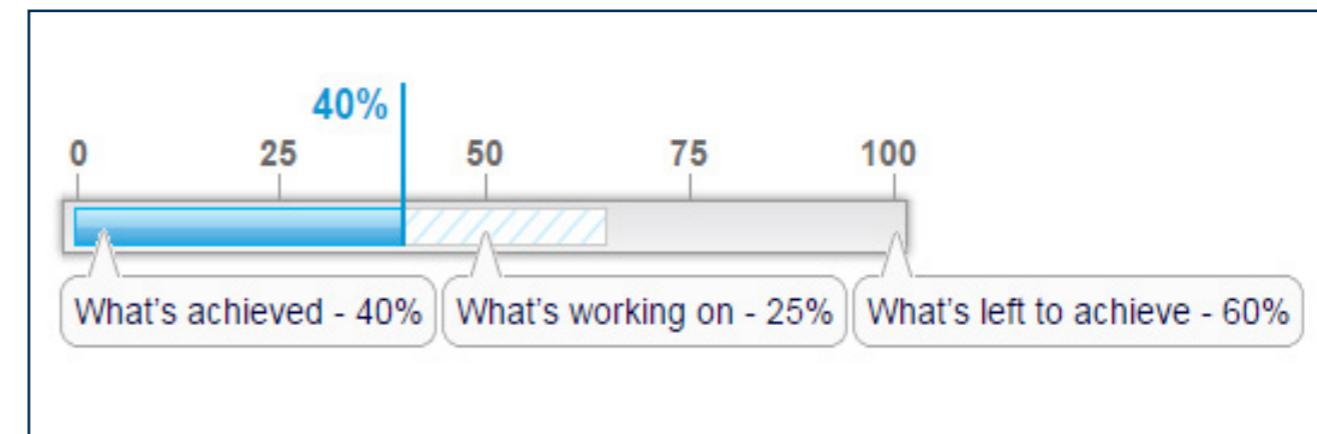
By hovering over the achieved progress bar for an individual unit, additional statistical data will be displayed. Example shown at right.

The progress bar shows the learners progress against the total amount of assessment criteria assigned.

Achieved

Where assessment criteria have reached a weighting / contribution of 10 or more and are therefore deemed as complete

Out of

Lists the total amount of assessment criteria for all of the units / learning out comes assigned to the learner. For standalone qualifications the progress bar is worked out as follows A / C achieved, divided by A / C assigned, times by 100.

E.g. as shown above 3 / 74 x 100 = 4% complete

Assessment Criteria
Achieved: 18
Out of: 44
40 % complete
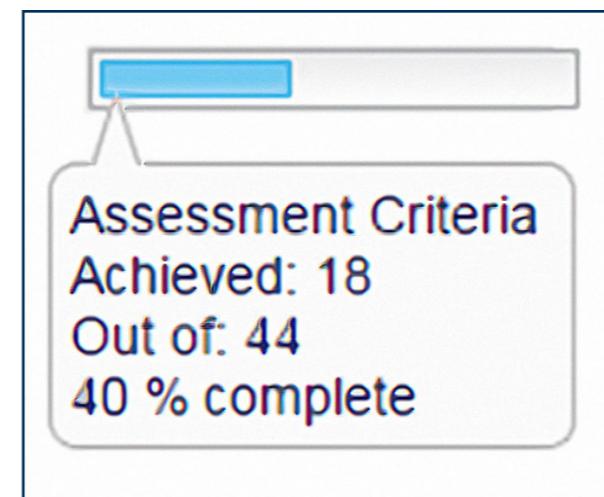
View Learner Evidence

Section Overview

This section explains how to view what the learner has left to achieve.

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View Learner Evidence

From the homepage, select the learner whose evidence you would like to view.

Select 'View ***** evidence' from top right of screen.

A list of evidence uploaded by the learner or assessor will be displayed.

The assessed column will display the current status of that piece of evidence. Examples are as follows:

Date / Time

Where a date is visible an assessment has previously been carried out against that piece of evidence and can now be re-assessed.

Awaiting your assessment

Suggest that no assessments have previously been carried out against that piece of evidence

Incomplete assessment

Will be visible when an assessment has been cancelled during the actual assessment and requires re-assessment before it will count towards the completion of a qualification

ePortfolio					2	1	?	

Menu ▼	Home \ Learners

Samantha Stokes's assessm ...   Submit new evidence | Qualification: Pearson BTEC Level 3 ▼ | Search:

Samantha Stokes assessment evidence for qualification "Pearson BTEC Level 3 Certificate in ICT Systems..."

Title ▲	Submitted ⇕	Assessed ⇕	Sampled ⇕
Evidence towards my qualification	21 Jun 2016 12:00	21/06/2016 12:02:36	07/07/2016 13:27:38
Observation 21/06/2016	21 Jun 2016 11:44	21/06/2016 11:49:24	
Witness Testimony	22 Jun 2016 12:37	13/07/2016 09:51:22	

⧉ Export	I◄ ◄◄ Page 1 of 1 ►► ►I 15 ▼	View 1 - 3 of 3

Select the underlined evidence title to review any previous comments / contributions towards units, learning outcomes and assessments criteria.

Contribution

Displays how much the selected piece of evidence contributes towards the total

Total

Displays a list of weightings / contributions from other pieces of evidence

Learner Needs to Achieve

Section Overview

This section explains how to view evidence submitted by a learner or assessor.

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Learner Needs to Achieve

From the homepage, select the learner who you would like to view.

Step 1

Select 'View what ***** needs to achieve' from right side of the screen.

The system will only display the units, learning outcomes and assessment criteria that require completion.

Unit titles can be seen at left side of the screen, when selected any incomplete learning outcomes and assessment criteria will be displayed.

If evidence has been assessed against the unit, learning outcomes and assessment criterias, the methods of assessment and the weightings / contribution will be displayed.

Please note, as soon as the assessment criteria has a weighting of 10 or above it will be removed from view.

To print this report, select either 'Print Units' or 'Print Units with evidence requirements' from the content menu at left of the screen.

ALWAYS LEARNING