

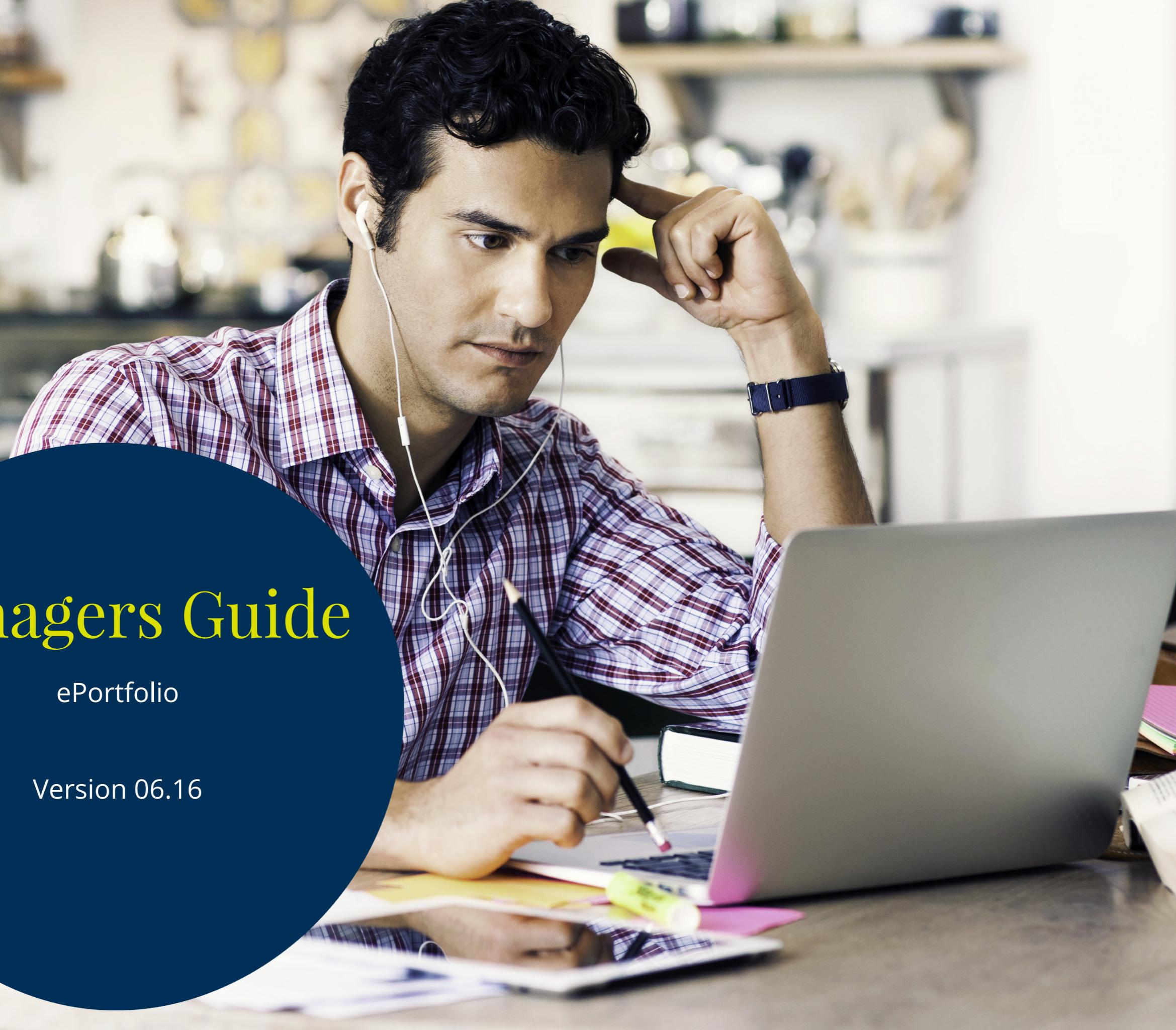


Pearson

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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System Requirements

Section Overview

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

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:

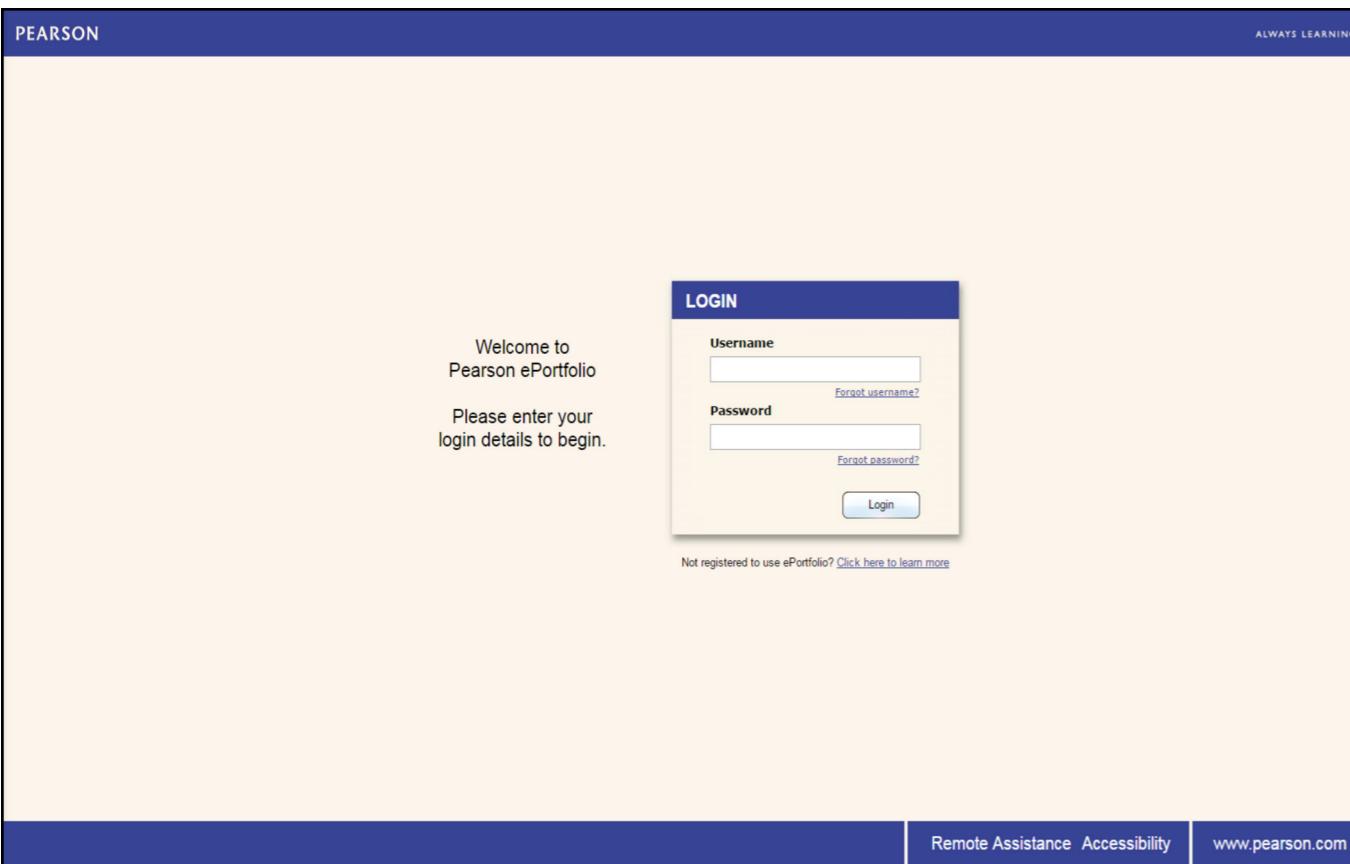
Step 1

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.



The screenshot shows the Pearson ePortfolio login interface. At the top, there is a dark blue header bar with the 'PEARSON' logo on the left and 'ALWAYS LEARNING' text on the right. The main content area has a light beige background. On the left side, there is a message: 'Welcome to Pearson ePortfolio' and 'Please enter your login details to begin.' In the center, there is a 'LOGIN' form with a dark blue header. The form contains two input fields: 'Username' and 'Password', each with a 'Forgot username?' or 'Forgot password?' link below it. Below the password field is a 'Login' button. At the bottom of the form, there is a link: 'Not registered to use ePortfolio? [Click here to learn more](#)'. At the very bottom of the page, there is a dark blue footer bar with links for 'Remote Assistance', 'Accessibility', and the website 'www.pearson.com'.

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

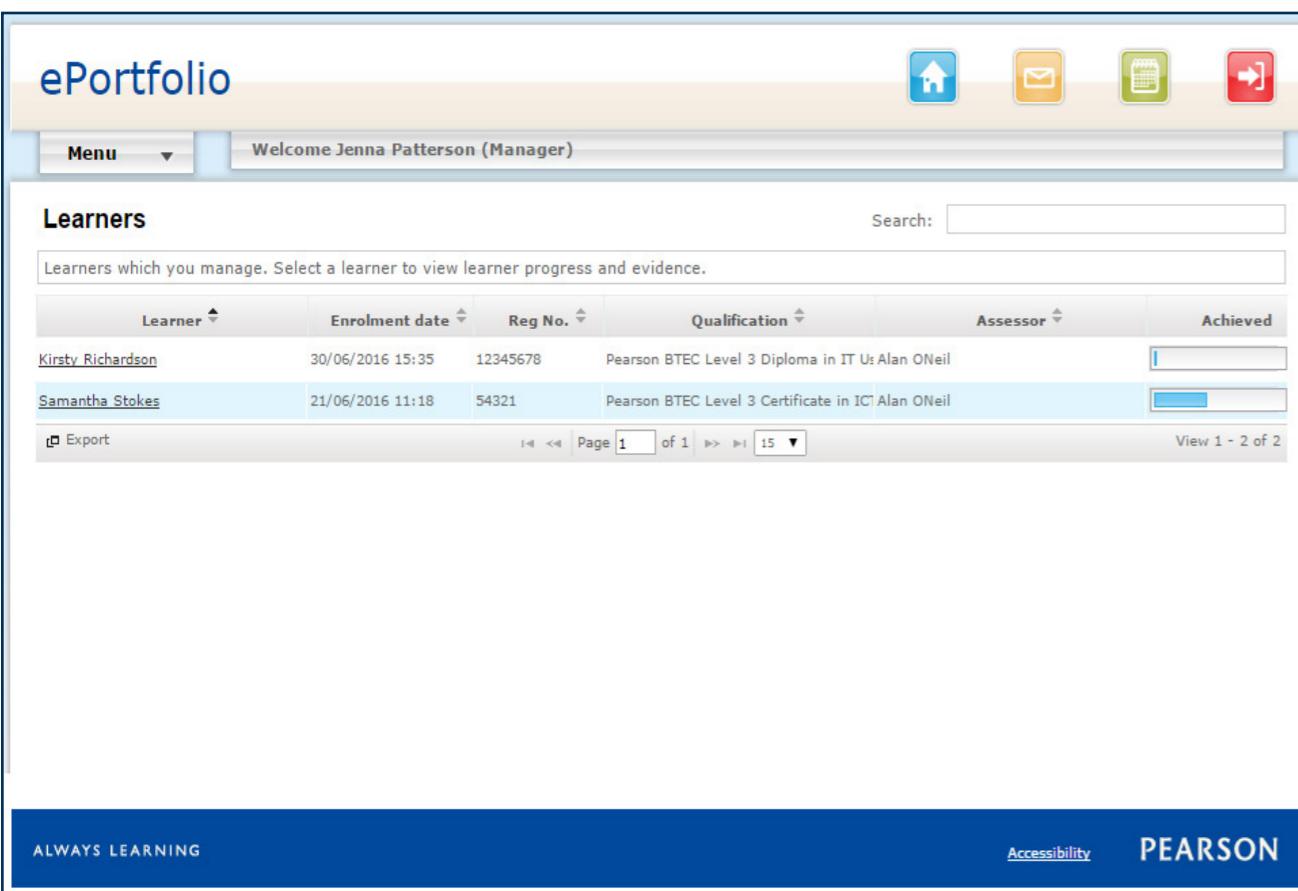
To Begin: Login to ePortfolio

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'.



The screenshot shows the ePortfolio Manager homepage. At the top, there is a navigation bar with icons for Home, Messages, Tasks, and Log Out. Below this is a header bar with a 'Menu' dropdown and the text 'Welcome Jenna Patterson (Manager)'. The main content area is titled 'Learners' and contains a table of managed learners. The table has columns for Learner, Enrolment date, Reg No., Qualification, Assessor, and Achieved. Two learners are listed: 'Kirsty Richardson' and 'Samantha Stokes'. Both rows show Pearson BTEC qualifications and 'Alan O'Neil' as the assessor. The 'Achieved' column contains progress bars. At the bottom of the table, there are buttons for 'Export' and 'View 1 - 2 of 2'. The footer of the page includes the Pearson logo and links for 'ALWAYS LEARNING', 'Accessibility', and 'PEARSON'.

Learner	Enrolment date	Reg No.	Qualification	Assessor	Achieved
Kirsty Richardson	30/06/2016 15:35	12345678	Pearson BTEC Level 3 Diploma in IT	Alan O'Neil	<div style="width: 50%;"></div>
Samantha Stokes	21/06/2016 11:18	54321	Pearson BTEC Level 3 Certificate in IT	Alan O'Neil	<div style="width: 100%;"></div>

ePortfolio Menu Drop-down

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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	ePortfolio
News	Displays the latest Pearson news articles	Learners
Help Articles	Loads the Pearson ePortfolio support materials and query submission form	Un-assessed Evidence
Account		Displays a list of un-assessed evidence
Tasks	Displays any outstanding tasks you've set and where applicable, will allow you to create tasks	Support Materials
My Tasks	Displays any outstanding tasks you have to complete	Programme Details
User Details	Allows the Centre Administrator to modify their personal user information	Will allow the assessor to view a list of products and associated content assigned to them by their Centre Administrators
Logout	Securely logs the user out of ePortfolio	Messages
		Will display your inbox and sent items within ePortfolio
		Reports
		Allows you to generate reports for statistic data

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

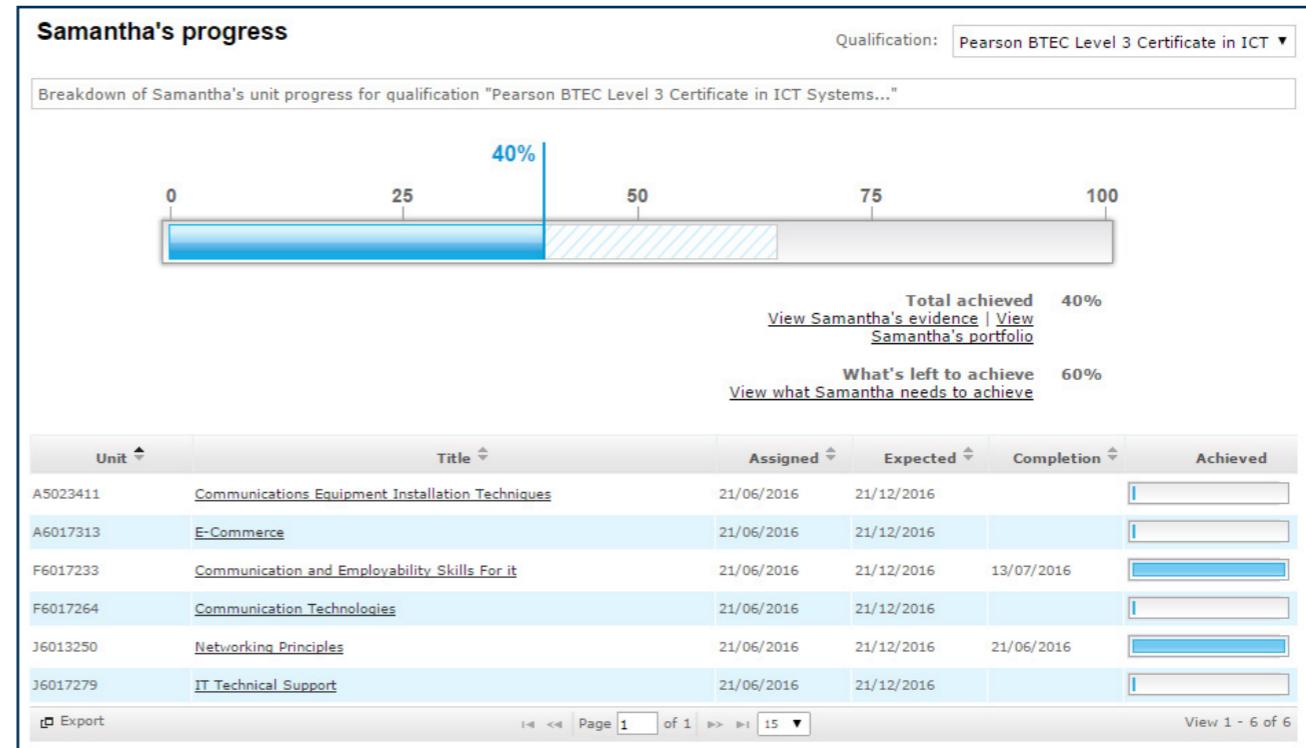
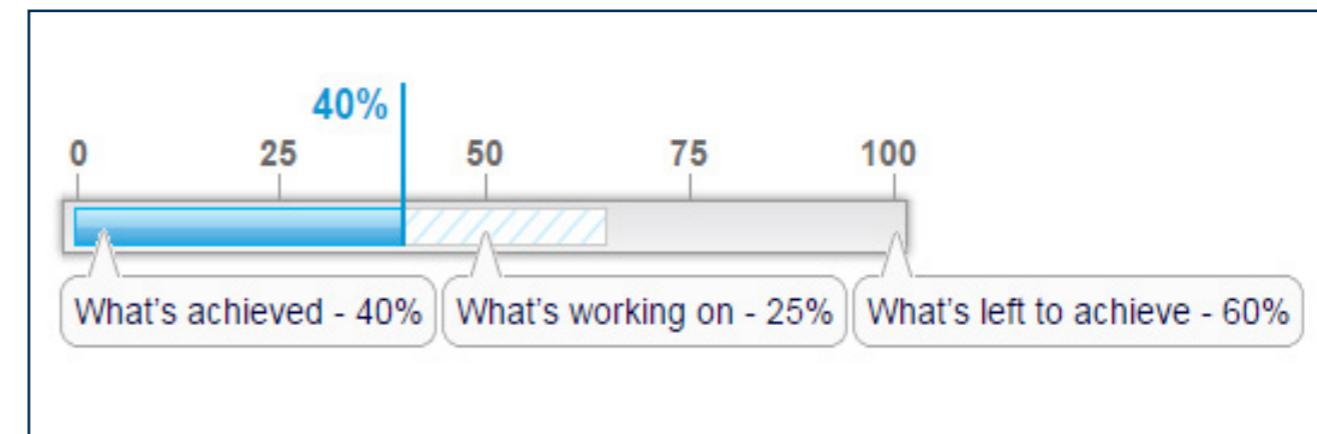
What's left to achieve

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.



Learner Progress Explained (Continued)

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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.

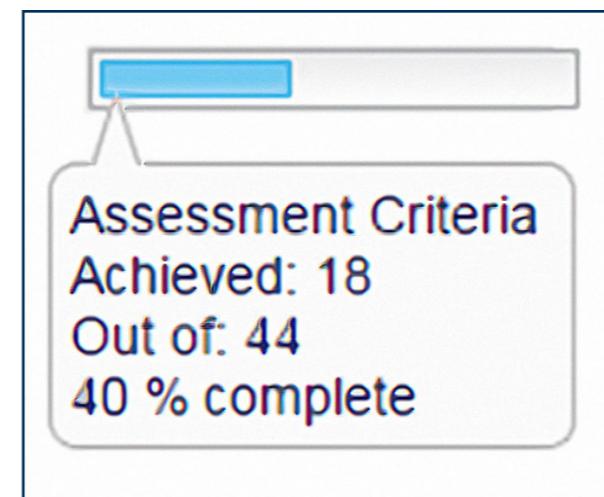
Achieved

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 outcomes 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 $3 / 74 \times 100 = 4\% \text{ complete}$



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

The screenshot shows the ePortfolio interface with the following data in the table:

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	

View Learner Evidence (Continued)

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

ePortfolio

Observation 21/06/2016

Learner: Samantha Stokes
Assessed: 21/06/2016 11:49:24
Message ID: 249

Submitted: 21/06/2016 11:44:02
Qualification: Pearson BTEC Level 3 Certificate in ICT...
Assessor: Alan O'Neil

Learner comments

Evidence

[Example.aif](#)

Assessor comments

Assessor: Alan O'Neil
Submitted: 21/06/2016 11:44
Attached is an audio file (DVR) from today's meeting, during which I was able to observe the learner carrying out a number of tasks and providing support to her colleagues
This should provide a substantial amount of evidence towards her units and completion of the qualification

Assessor comments

Assessor: Alan O'Neil
Submitted: 21/06/2016 11:54
A really strong piece of evidence. We just need a few more examples as well as a witness testimony before we can this unit off

How far does this evidence contribute to my achievement?

Unit \ Learning outcome \ Assessment criteria	Contribution	Total
Unit 1 - Communication and Employability Skills For it		
Learning Outcome 1.2 - LO2 Understand the principles of effective communication		
2.1. <input checked="" type="checkbox"/> explain the principles of effective communication	3	13
2.2. <input checked="" type="checkbox"/> discuss potential barriers to effective communication	7	17
Learning Outcome 1.3 - LO3 Be able to use IT to communicate effectively		
3.1. <input checked="" type="checkbox"/> use IT to aid communications	5	15

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Learner Needs to Achieve

Section Overview

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

Learner Needs to Achieve

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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.

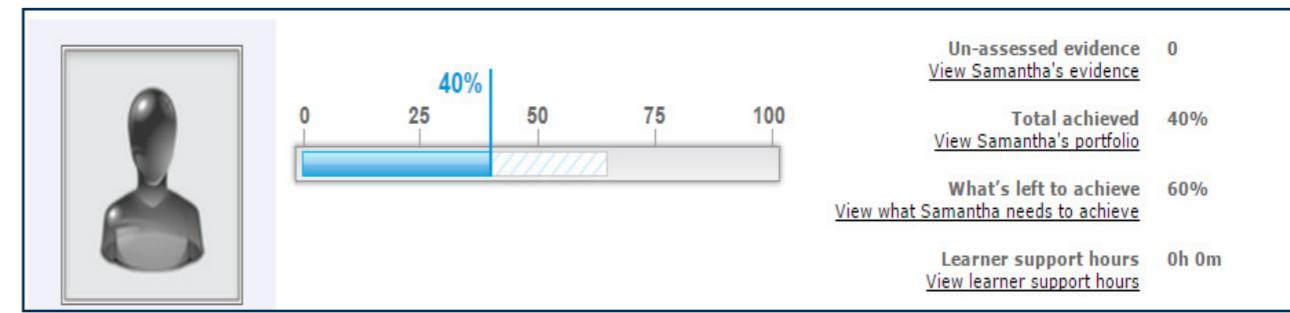
The system will only display the units, learning outcomes and assessment criteria that require completion.

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.



The figure shows a detailed report of what a learner needs to achieve. It includes a table of content and a list of learning outcomes with their respective evidence, assessed date, contribution, and assessment method.

Content	Unit : E-Commerce			
Communication Technologies	N/A			
IT Technical Support	Learning Outcome 1 : LO1 Know the technologies required for an e-commerce system			
E-Commerce	Assessment Criteria			
Communications Equipment Ins...	1.1. describe the technologies required for e-commerce			
Print Units	Evidence title			
Print Units with evidence requirements	Evidence of prior achievement	Assessed	Contribution	Assessment method
	13/07/2016 10:12:42	1	Observation, Witness testimony	
	Learning Outcome 2 : LO2 Understand the impact of e-commerce on organisations			
	Assessment Criteria			
	2.1. explain the impact of introducing an e-commerce system to an organisation			
	Evidence title			
	Evidence of prior achievement	Assessed	Contribution	Assessment method
	13/07/2016 10:12:42	5	Observation, Witness testimony	
	Learning Outcome 3 : LO3 Understand the effects of e-commerce on society			
	Assessment Criteria			
	3.1. explain the potential risks to an organisation of committing to an e-commerce system			
	Evidence title			
	Evidence of prior achievement	Assessed	Contribution	Assessment method
	13/07/2016 10:12:42	7	Observation, Witness testimony	
	Learning Outcome 4 : LO4 Be able to plan e-commerce strategies			
	Assessment Criteria			
	4.1. review the regulations governing e-commerce			
	Evidence title			
	Assessed	Contribution	Assessment method	

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