

## SelfSmart

## Centre Access

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# SelfSmart Walkthrough

The following walkthrough of SelfSmart details how each Learner, Centre and Guide can access and benefit from SelfSmart.

## 1.1 Definitions

<b>Learner</b>	The individual being supported through SelfSmart
<b>Guide</b>	The employee (or department within the Centre ) responsible for supporting the Learner through SelfSmart (e.g. mentor, tutor, teacher, adviser, counsellor)
<b>Centre</b>	The organisation/ group that has the responsibility of managing the Guides
<b>Profile</b>	A series of questions, responses and reports based on Mental Health/ Emotional Intelligence/ Multiple Intelligence/ Resilience+
<b>Profile Subject</b>	One of the 24 component areas of the four Profiles (e.g. self-esteem, self-control, wordsmart, flexibility)
<b>How Do You Feel</b>	Mental Health and Wellbeing
<b>Know Yourself</b>	Emotional Intelligence
<b>What Do You Like to Do</b>	Multiple Intelligence/ Learning and Employment Styles
<b>Resilience+</b>	Personal Resilience*

\*Based on Clearaims own research/ theories - See SelfSmart Integrity document for further information.



## 1.2 SelfSmart Homepage

The main portal for Centres, Guides and Learners to access SelfSmart.

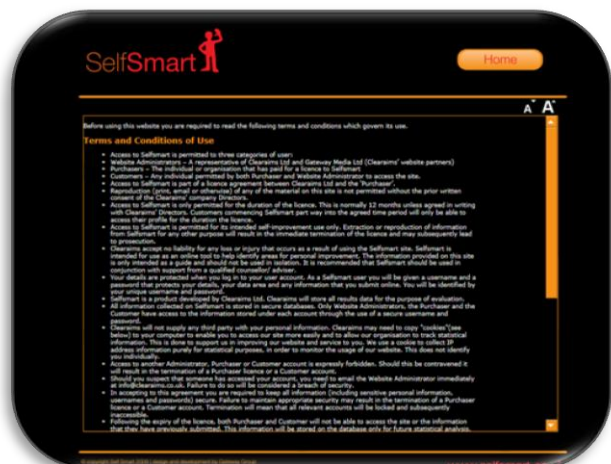
The page contains information on SelfSmart and what to expect on completing the profiles. The page also provide access to the main login page and contact details for support.

*NB Customers of Pearson/ Edexcel will need to access SelfSmart via a separate portal on the Skilled for Life website.*



## 1.3 Terms and Conditions and Privacy Statement

Outlining for Learners, Guide and Centres how SelfSmart works; including access rights and how the data is managed and stored safely.



## 1.4 Login Page

Learners, Centres and Guides all login through the same page.

Each will be directed to a different access tier of SelfSmart depending on their access rights.



### 1.4.1 Privacy

All Learners, Centres and Guides need to be made aware that by accessing SelfSmart they agree to the Terms and Conditions.

Learners need to be made aware that their data will be accessible by their allocated adviser and that SelfSmart's administrators will have access to the data for site management purposes.

Before you log in to SelfSmart please click here to access and read our [Terms and Conditions](#).

By accessing SelfSmart, you agree to be bound by the terms and conditions appearing in this document. On completing the SelfSmart profiles a copy of your results will be made accessible to your adviser and to the site's administrators. These will remain confidential in accordance with the [Privacy Statement](#).

## 1.5 Delivery Admins Tab


### Delivery Admins

This page enables the Centre Administrator to view all Guides associated with the licence.

The page contains information on each Guide's:

**Name** (First Name + Surname/ Client ID)

**Username** Allocated Username to login to SelfSmart

**Password** Mouse over the  icon to display the Guide's password

**Change Password** Click on the  icon to change a Guide's password




SelfSmart

Logged in as: Demo Centre  
Date: 20/09/2012  
[Logout](#)

Delivery Admins | Add Admins | Manage Licence | User Allocation

Delivery Admin name	Username	Password	View Charts
John J	John123		
Karen L	Karen456		
Malcolm F	Malcolm789		
Steven D	Steven012		
Paul G	Paul345		
Melanie F	Melanie678		
Jennie T	Jennie441		
Brenda B	Brenda555		
John G	John641		

### 1.5.1 Group Charts

Clicking on the  tab, will display a table of all the Learners allocated to a Guide.

Results for up to 30 Learners can be graphed simultaneously.



### 1.5.2 Group Charts - Profile Selection

When all Learners have been selected, the Centre Administrator can click on the required profile category to create a chart.



### 1.5.3 Group Charts Filter

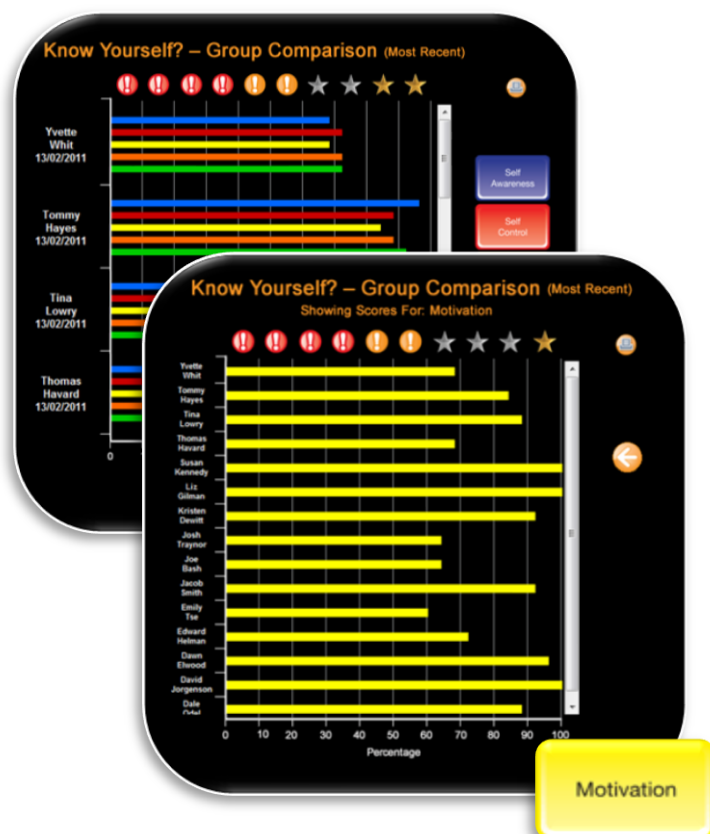
The most recent results for each Learner will be displayed for the selected Profile category.

Scroll down the screen to view up to 30 Learners.

Clicking on the required graph key will filter the charts even further to select a single Profile category

eg:

Motivation




### 1.5.4 Group Charts Key

Learner names are displayed down the left-hand side of the screen.

The Learners most recent Profile scores are displayed across the horizontal axis.

### Charts

All Charts display a  print button. This enables Guides/ Centre Administrators to print off charts when compiling Learner reports.

If additional charts/ reports are required beyond what is available on SelfSmart, please email requirements to [info@selfsmart.org](mailto:info@selfsmart.org)

## 1.6 Add Admins

### Add Admins

This page enables the Centre Administrator to create a new Guide.

A unique Guide name is required in addition to a Username and Password.

*NB - Once created, Guides can only be deleted by the SelfSmart team.*

SelfSmart

Logged in as: Demo Centre  
Date: 20/09/2012  
[Logout](#)

Delivery Admins | **Add Admins** | Manage Licence | User Allocation

Delivery Admin Name:  \*  
Username:  \*  
Password:  \*

\* Required Field  
[Add](#)


## 1.7 Manage Licence Tab

### Manage Licence

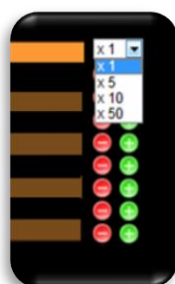
This page displays :


- How many logins are allocated to the Licence.
- How many logins have been allocated to each Guide.
- How many logins are yet to be allocated to a Guide.

The Login Allocation Table shows each Guide's used/ available/ total number of logins. Once a Learner login has been created this will be removed from the Available column and added to the Used column.

To allocate more logins to a Guide, click on  to the right of the table.

Multiple logins can be assigned by selecting from the drop down menu.



If Learner logins have not been assigned to a Learner, they can be reassigned by clicking .

SelfSmart

Logged in as: Demo Centre  
Date: 20/09/2012  
[Logout](#)

Delivery Admins | Add Admins | **Manage Licence** | User Allocation

License Quantity: 500  
User Logins Allocated: 260  
User Logins Remainin g: 240

Login Allocation:

Delivery Admin Name	Used	Available	Total	
John J	25	25	50	x 1
Karen L	25	25	50	x 1
Malcolm F	15	15	30	x 5
Steven D	15	15	30	x 10
Paul G	15	15	30	x 50
Jennie T	15	15	30	x 1
Brenda B	5	15	20	x 5
John G	5	15	20	x 1

## Manage Licence

This tab displays how many logins are allocated to each Guide. Learners are created under the Guide's admin screen. Existing Learners can be re-allocated under the User Allocation Tab.

## 1.8 User Allocation Tab

### User Allocation

This screen enables the Centre Administrator to re-allocate Learners from one Guide to another.

To re-allocate a Learner, click on the existing Guide from the drop-down menu.

The following screen will display all Learners allocated to the Guide.

To re-allocate a Learner/ multiple Learners to another Guide; select the relevant tick-boxes .

Once all the required Learner's have been selected, click the new Guide's name from the drop down menu at the bottom of the table.

The top screenshot shows the 'SelfSmart' interface with the 'User Allocation' tab selected. The 'Existing Delivery Admin' dropdown menu is open, showing a list of names: John J, Karen L, Malcolm F, Steven D, Paul G, Jennie T, Brenda B, and John G. The bottom screenshot shows the 'Select users to re-allocate' table with the following data:

Username	First Name	Client ID	Re-allocate
James 827			<input type="checkbox"/>
Paul 3349			<input type="checkbox"/>
Cath 8493			<input type="checkbox"/>
Naeem 4398			<input type="checkbox"/>
Nina 3849			<input type="checkbox"/>
Melanie 3947			<input type="checkbox"/>
Tony 0293			<input type="checkbox"/>
Adrian 0834			<input type="checkbox"/>

At the bottom of the table, there is a 'New Delivery Admin' section with a dropdown menu and an 'Update' button.

## 2 Complete/ Repeat

SelfSmart is designed to be repeated many times over. This will enable each Learner to self-manage their behaviours, attitudes and strategies for coping in life.

There are no strict guidelines for how often SelfSmart should be repeated or for how long the gap should be between sessions. It is beneficial to repeat SelfSmart following any support, counselling, advice, workshop, course or intervention.

Although the results for the **What Do You Like to Do?** (Learning/ Employment Styles) section can change over time, it is likely that this change will not be as pronounced. It is therefore recommended that this section be repeated less frequently. As 'What Do You Like to Do?' is the longest profile section in SelfSmart, this will significantly reduce the time required to repeat the SelfSmart process.

## 3 Contact Information

Please contact [info@selfsmart.org](mailto:info@selfsmart.org) or 0871 222 7430 for all SelfSmart enquiries (technical and content focussed)