



The Intelligent Portfolio

Manager Quick Start Guide

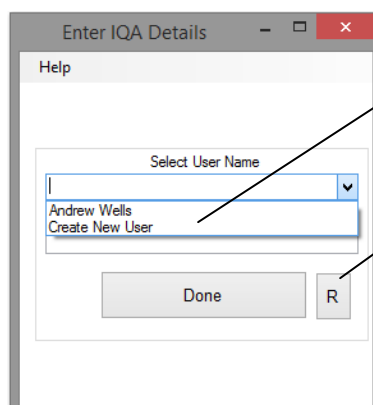
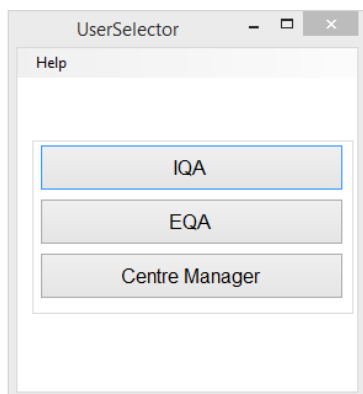
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Manager Quick Start Guide

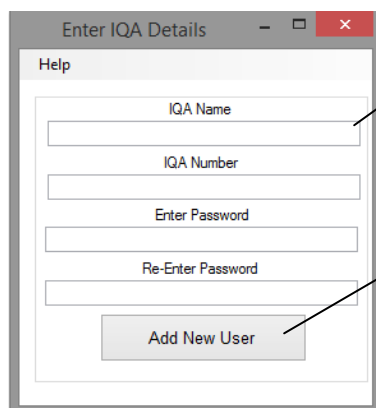
Manager Login

Select IQA, login or, if this is the first time you have logged select 'Create New User' and enter your details.



Create New User

Use the 'R' button to reset your password.



Enter your details.

Click 'Add New Learner'

When you logon you are greeted by the Manager Front Page.

Manager Front Page

This gives you an overview of your assessors' Learners' Progress

Select the Assessor from the Dropdown Menu



Assessor: Learner: Certification Messages Settings Quality Assurance Records Exit Program

Andrew Wells Learner Overview

Learner Name	Enrol Date	Reg Date	Reg No.	Act End Date	Act End Date	% Completed	Days Remaining	Last Reviewed	Sample Type	Sample Date	Units to Sample
Damen Davidson	10/12/2014	05/11/2014	704492	10/05/2015	N/A	100	112	20			
Demo Learner	No Review	Not Registered	Not Registered	29/04/2015	N/A	1	70				
Eddie Eagle	No Review	Not Registered	Not Registered	11/02/2016	N/A	81					
Fermentation Learner	No Review	12/02/2015	1234567	11/02/2016	12/02/2015	3					
John	No Review	Not Registered	Not Registered	14/05/2015	N/A	0	85				
June July	15/11/2014	13/02/2015	3456789	15/11/2015	N/A	0	270	4			
Michael Brown	09/12/2014	05/12/2014	1355252	09/06/2015	N/A	100	111	20			
Mr Demonstration Learner	06/11/2014	06/11/2014	1234	06/05/2015	N/A	100	77	95			
Mr Sid	11/02/2015	11/02/2015	007	11/08/2015	11/02/2015	100	74	6			
Paul Goodacre	09/12/2014	15/12/2014	1355252	09/12/2015	N/A	100	294	1			
Test Bicky	28/10/2014	Not Registered	Not Registered	28/04/2015	N/A	1	69	111			

The Assessor's Learners Details and Progress are displayed.

The Learner Progress Panel

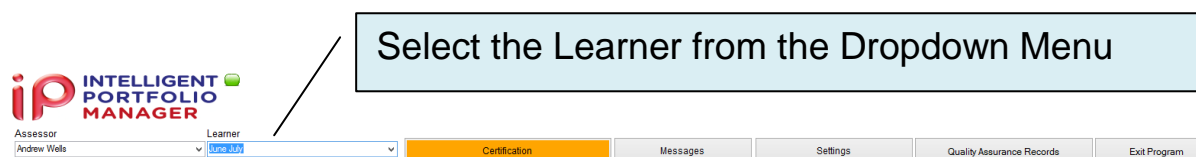
This column shows the Learner's progress through the qualification the % Bar Graph turns green when the Learner reaches 100%

% Completed	Days Remaining	Last Reviewed
100	112	20
1	70	
81		
3		
0	85	
0	270	4
100	111	20
100	77	95
100	74	6
100	294	1
1	69	111

This column shows the number of days since the Learner was last reviewed.
 Green = 0 – 30
 Amber = 30 – 60
 Red = 60+

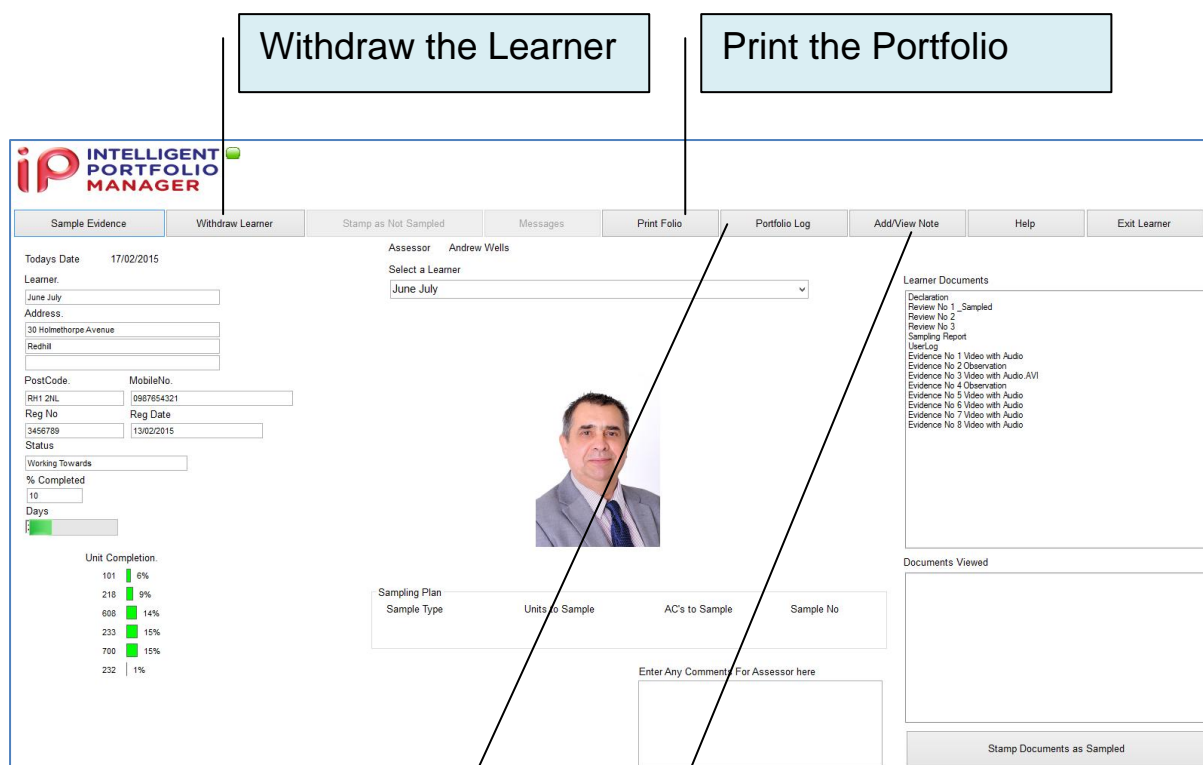
This column shows the number of days remaining in programme
 Turns red when less than 30 Days

Select a Learner



The screenshot shows the top navigation bar of the Intelligent Portfolio Manager. The 'Learner' dropdown menu is open, showing 'June July' as the selected option. A callout box with the text 'Select the Learner from the Dropdown Menu' points to this menu. Other menu items include 'Assessor' (Andrew Wells), 'Certification', 'Messages', 'Settings', 'Quality Assurance Records', and 'Exit Program'.

You can then view the Learner Details and Progress and also the Learner Portfolio. You can also withdraw the Learner, Print the Portfolio, View the Portfolio Log and Add Notes to the Portfolio.

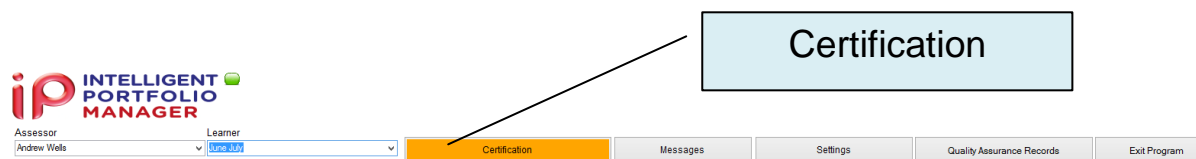


The screenshot displays the main interface for a learner's portfolio. The 'Withdraw Learner' button is highlighted with a callout box. The 'Print Folio' button is also highlighted with a callout box. The interface includes a navigation bar with buttons for 'Sample Evidence', 'Withdraw Learner', 'Stamp as Not Sampled', 'Messages', 'Print Folio', 'Portfolio Log', 'Add/View Note', 'Help', and 'Exit Learner'. The main content area shows learner details, a progress bar, a unit completion chart, and a list of documents. A callout box 'View the Portfolio Log' points to the 'Portfolio Log' button, and another callout box 'Add or View Portfolio Notes' points to the 'Add/View Note' button.

View the Portfolio Log

Add or View Portfolio Notes

Claiming Certificates



When the 'Certification' tab is highlighted a Qualification is ready to claim.

Hover over the tab to reveal the waiting to be claimed button.

The first screenshot shows a dropdown menu with three options: 'Certification' (orange), 'Waiting to be claimed' (orange), and 'Waiting for Certificate' (grey). A callout box points to the 'Waiting to be claimed' button with the text: "Select 'Waiting to be claimed' Button".

The second screenshot shows the 'Learners ready to be claimed' section with a list of names: Darren Davidson and Michael Brown. Below the list are two buttons: 'Print Selected' and 'Email Selected'. A callout box points to these buttons with the text: "Select 'Print Selected' or 'Email Selected'".

The third screenshot shows the 'Email Notification' dialog box. It has a text input field for the assessor's email address, currently containing 'jill@catsltd.biz'. Below this is a preview of the message to be sent, which includes the text: "Learners ready to be claimed", "Darren Davidson", "Michael Brown", "Centre Manager", and "Andy". At the bottom are 'Send Email' and 'Cancel' buttons. A callout box points to the email address field with the text: "Select the Email Address of Admin Team to Claim Certificate."

The image shows a sequence of three screenshots from a software application, illustrating the process of adding a certificate to a learner's portfolio.

First Screenshot: A vertical menu with three orange items: 'Certification', 'Waiting to be claimed', and 'Waiting for Certificate'. A callout box points to the 'Waiting for Certificate' item.

Second Screenshot: The 'Waiting for Certificate' item is selected, and a list of learners is displayed below it. The list is titled 'Waiting for Certificate' and contains two names: 'Darren Davidson' (highlighted in blue) and 'Michael Brown'. A callout box points to 'Darren Davidson'.

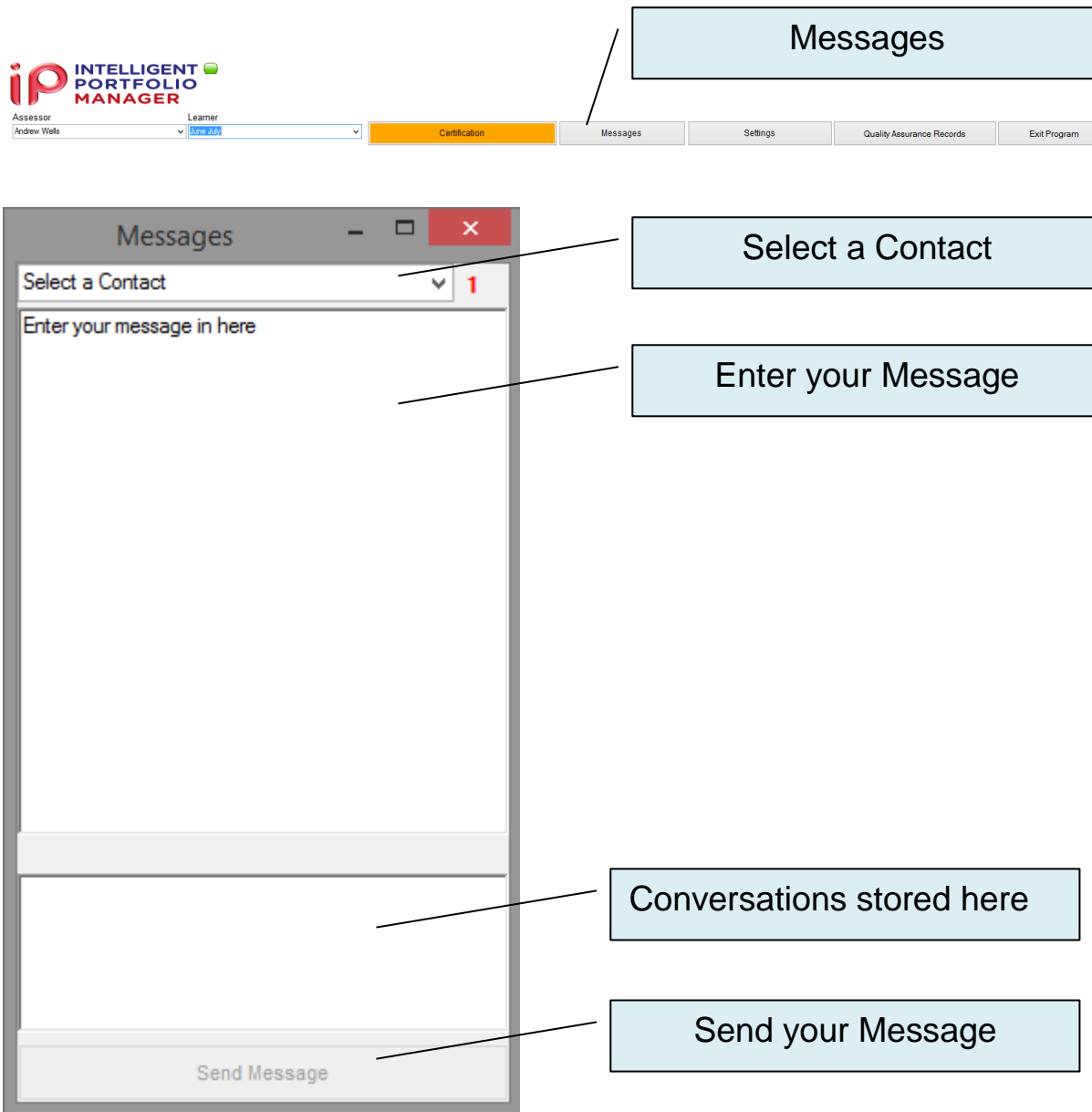
Third Screenshot: A button labeled 'Add Certificate to Selected' is visible at the bottom of the interface. A callout box points to this button.

Callout Boxes:

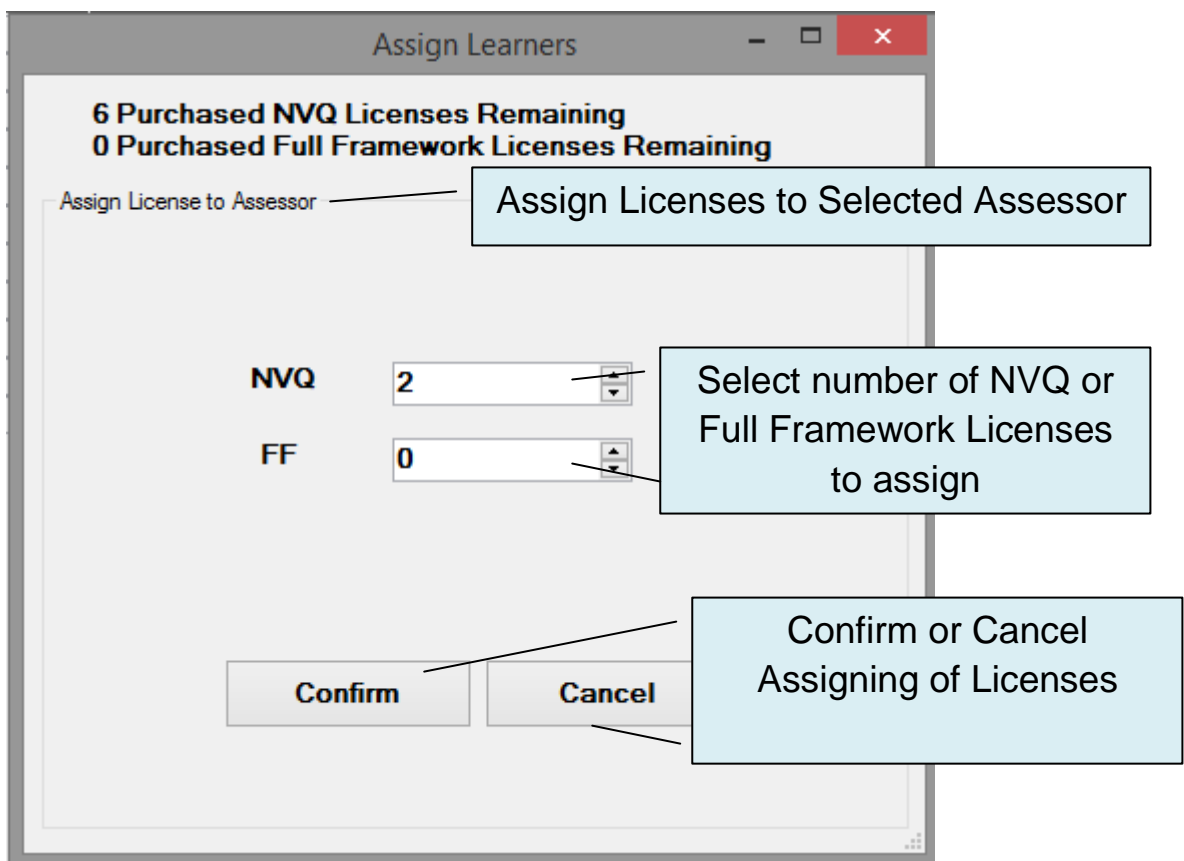
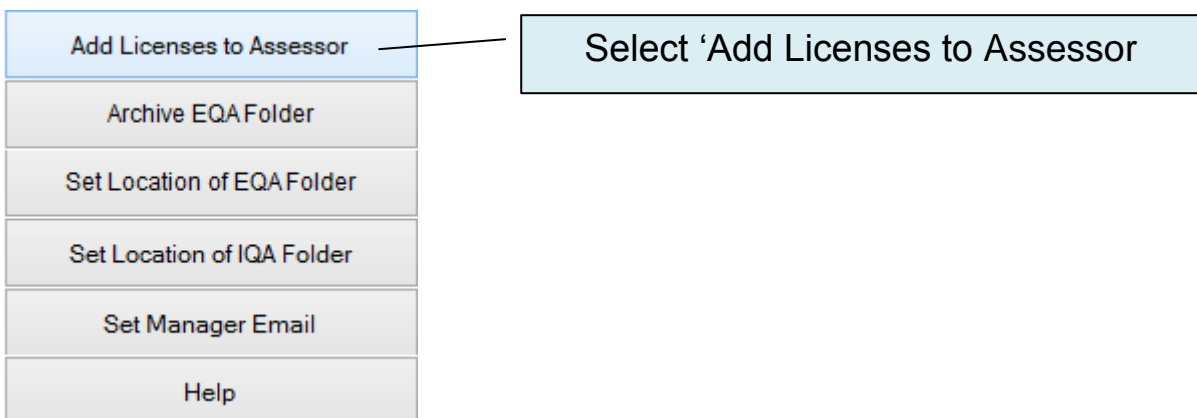
- Select 'Waiting for Certificate'
- Select the Learner
- Select 'Add Certificate to Selected'
You can now 'Browse' for the certificate.

When you have added the Certificate, the portfolio is moved to the EQA folder awaiting your next EQA monitoring visit, after which the portfolio can be archived to a memory device.

Messaging



Add / Assign Licenses to Assessor



Archive EQA Folder

The screenshot shows the Intelligent Portfolio Manager interface. At the top left is the logo 'ip INTELLIGENT PORTFOLIO MANAGER'. Below it are dropdown menus for 'Assessor' (Andrew Wells) and 'Learner' (Tina Joy). A navigation bar contains buttons for 'Certification', 'Messages', 'Settings', 'Quality Assurance Records', and 'Exit Program'. A callout box labeled 'Select 'Settings'' points to the 'Settings' button. Below the navigation bar is a vertical menu with options: 'Add Licenses to Assessor', 'Archive EQA Folder', 'Set Location of EQA Folder', 'Set Location of IQA Folder', 'Set Manager Email', and 'Help'. A callout box labeled 'Select 'Archive EQA Folder. This allows you to Browse for a location and to Archive your portfolios' points to the 'Archive EQA Folder' option.

Set Folder Locations

The screenshot shows the Intelligent Portfolio Manager interface, identical to the one above. A callout box labeled 'Select 'Settings'' points to the 'Settings' button. Below the navigation bar is a vertical menu with options: 'Add Licenses to Assessor', 'Archive EQA Folder', 'Set Location of EQA Folder', 'Set Location of IQA Folder', 'Set Manager Email', and 'Help'. A callout box labeled 'Select the Folder to Set Location Browse for & Set Locations' points to the 'Set Location of EQA Folder' option.

Quality Assurance Records



Assessor: Andrew Wells | Learner: [dropdown] | Certification | Messages | Settings | Quality Assurance Records | Exit Program

Quality Assurance Records

- Show IQA Monitoring
- Show Assessor Monitoring
- Sample Plan
- Print Learner Log
- Performance Reports
- Assessor Profile

These buttons take you to the Folder containing the IQA / Assessor Monitoring Reports.

This button takes you to the Sample Plan

- Show IQA Monitoring
- Show Assessor Monitoring
- Sample Plan
- Print Learner Log
- Performance Reports
- Assessor Profile

This button allows you to print the Learner Log

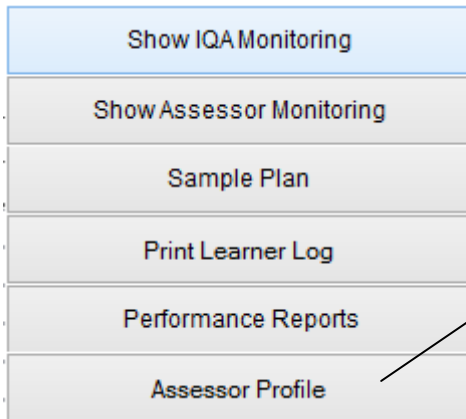
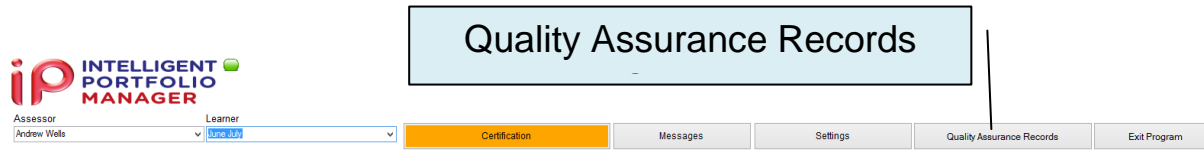
This button allows you to Create an IQA Report

Create IQA Report

IQA (Monitored)	How Demonstrated
Plan and prepare monitoring activities according to the requirements of own role	<input type="text"/>
Determine whether assessment processes and systems meet and operate according to quality requirements	<input type="text"/>
Check that assessors meet the requirements for their role	<input type="text"/>
Check that assessments are planned, prepared for and carried out according to agreed procedures	<input type="text"/>
Check that assessment methods are safe, fair, valid and reliable	<input type="text"/>
Check that assessment decisions are made using specified criteria	<input type="text"/>
Compare assessor decisions to ensure they are consistent	<input type="text"/>
Provide assessors with feedback, advice and support to help them maintain and improve their assessment practice	<input type="text"/>
Work with others to ensure the standardisation of assessment practice and outcomes	<input type="text"/>
Follow agreed procedures when there are significant concerns about the quality of assessment	<input type="text"/>
Follow agreed procedures for the recording, storing, reporting and confidentiality of information	<input type="text"/>
Activity observed	<input type="text"/>
Feedback	<input type="text"/>

Create an IQA Report referenced to the National Standards.

Assessor Profile



This button takes you to the Folder containing the Assessor Profile

