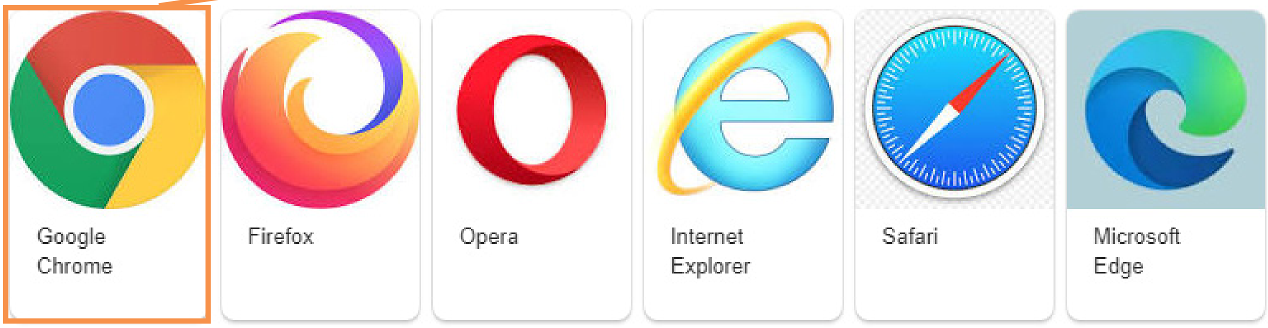
Skills Portfolio

User Guide

Contents

Logging into Skills Forward

1. Open your Web Browser (Preferably Chrome)

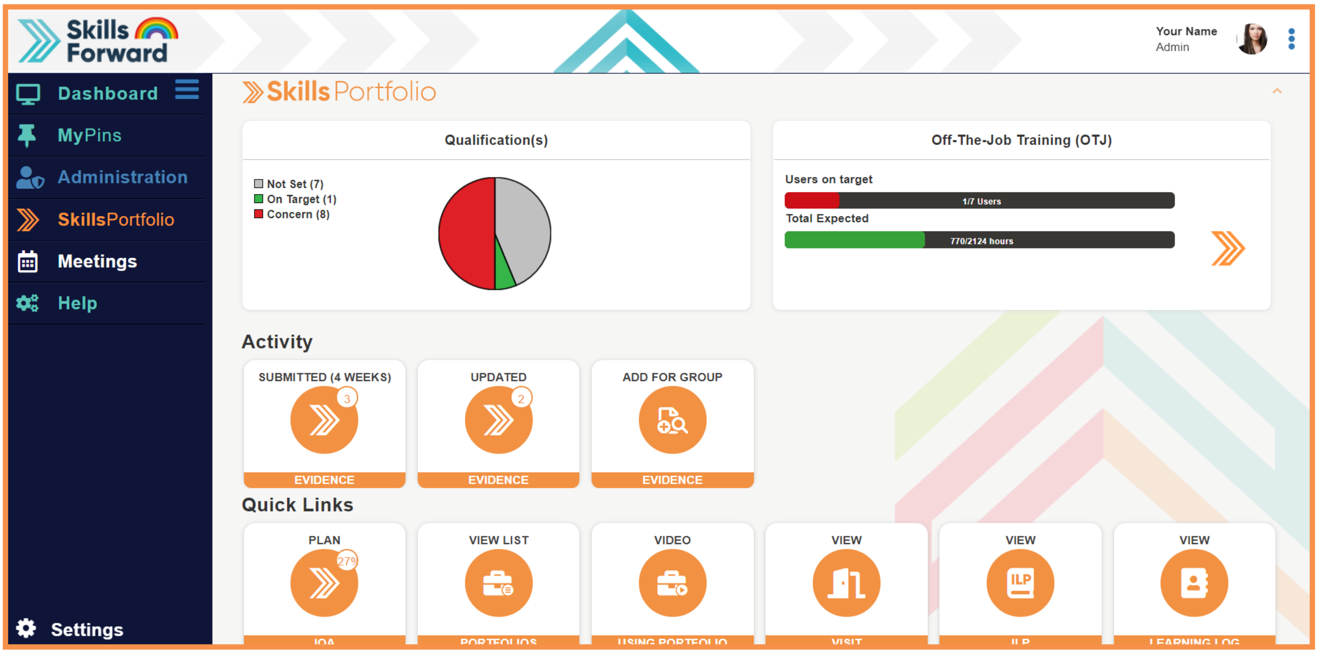


2. Enter the following address - **myskillsforward.co.uk**

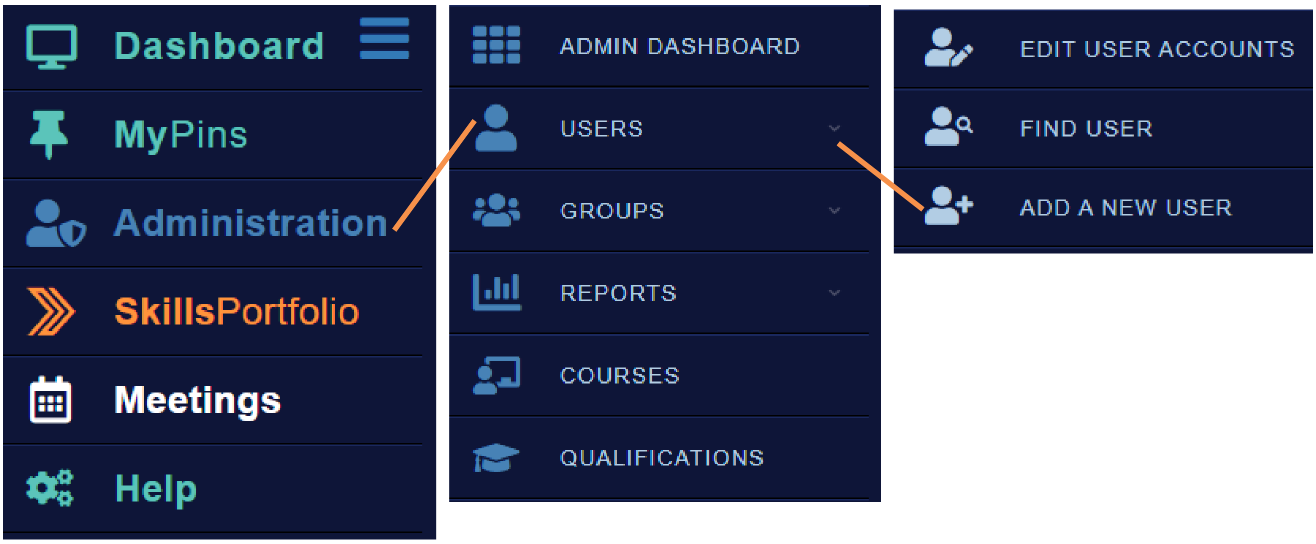
3. Enter your User name
4. Enter your Password
5. Select the Login button.

How to add a learner

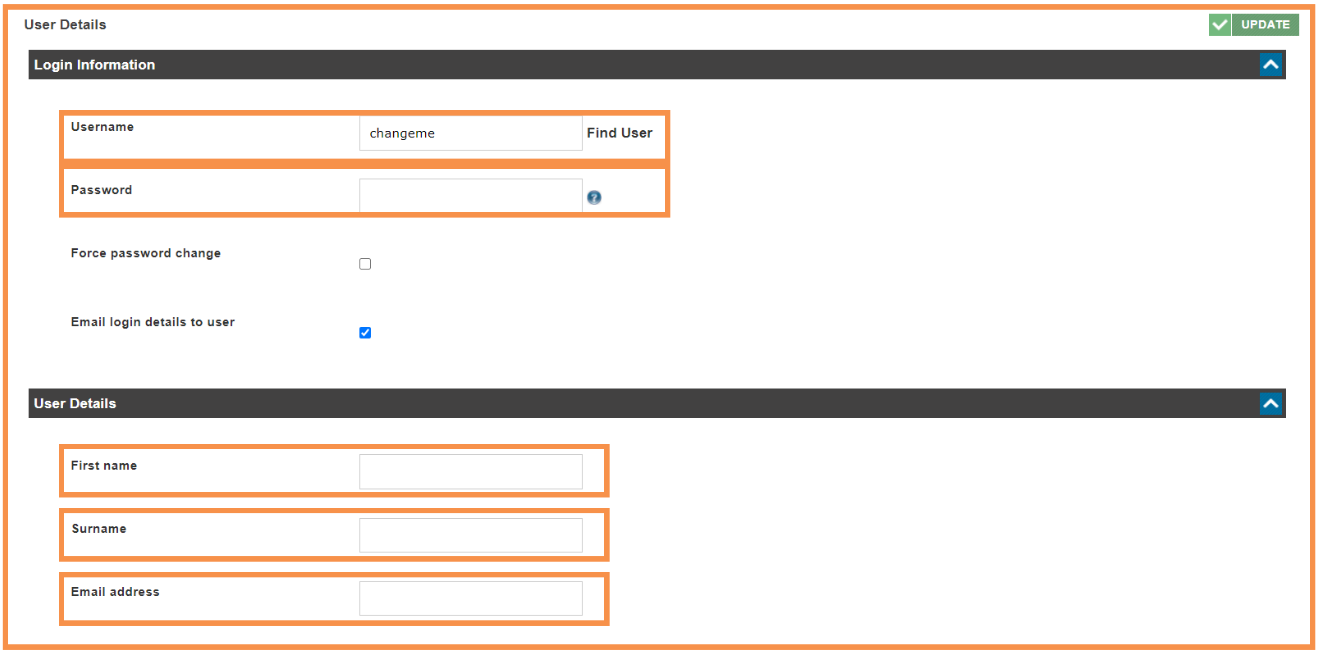
Having logged onto the platform you will arrive at the Dashboard which is your home page.



From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon > Select **add a new user.**



Next complete the mandatory fields:



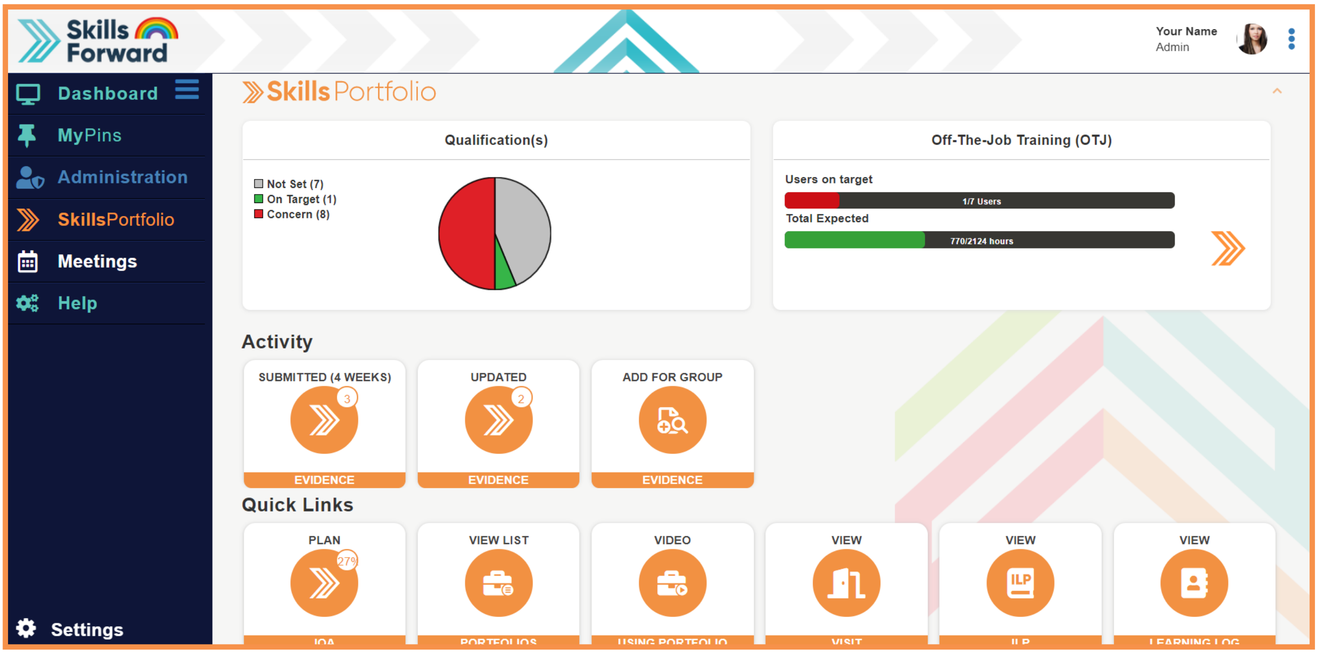
Username –create a username for your learner, there are no rules it just needs to be bespoke as no two usernames can be the same.
Password – if you know what the learners password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.
First name – specify the first name of your learner.
Surname – specify the surname of your learner.
Email address – specify the email address of your learner if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

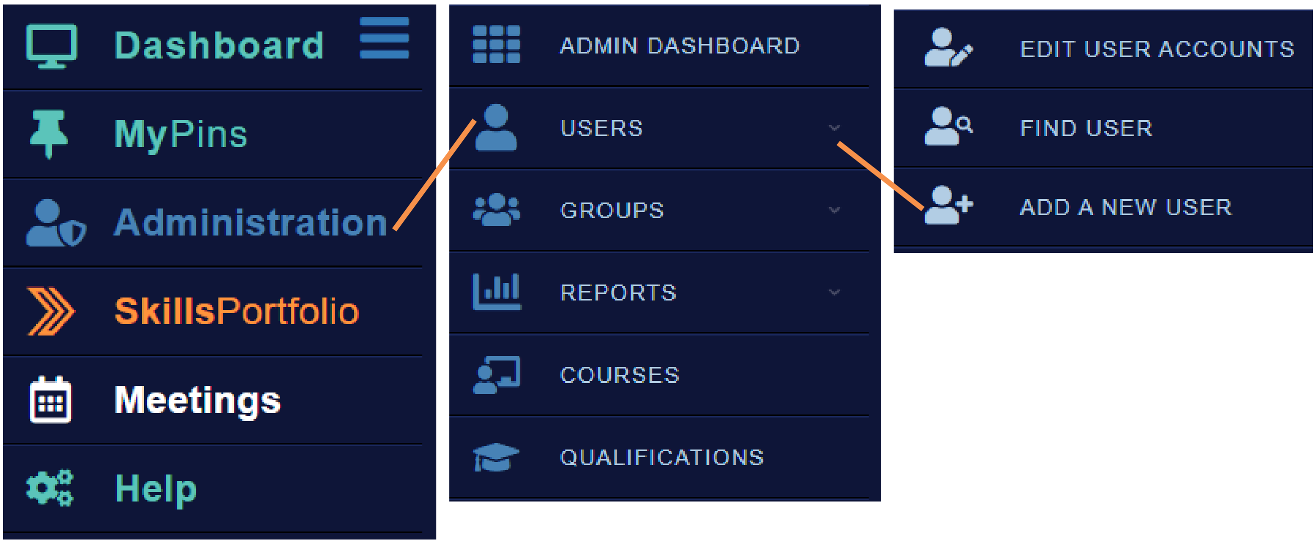
Select **Update** to finalise the creation of this account, all is left to do is assign a qualification.

Creating an Assessor

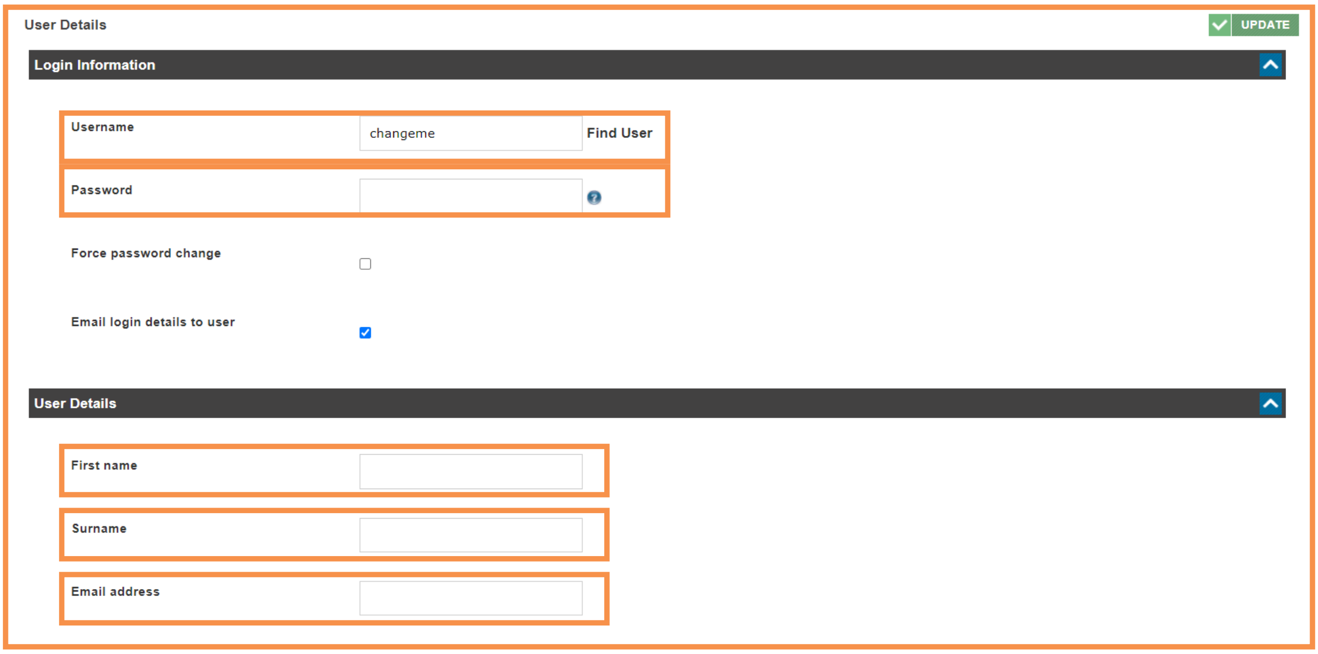
Having logged onto the platform you will arrive at the Dashboard which is your home page.



From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon >
Select **add a new user.**



Next complete the mandatory fields:



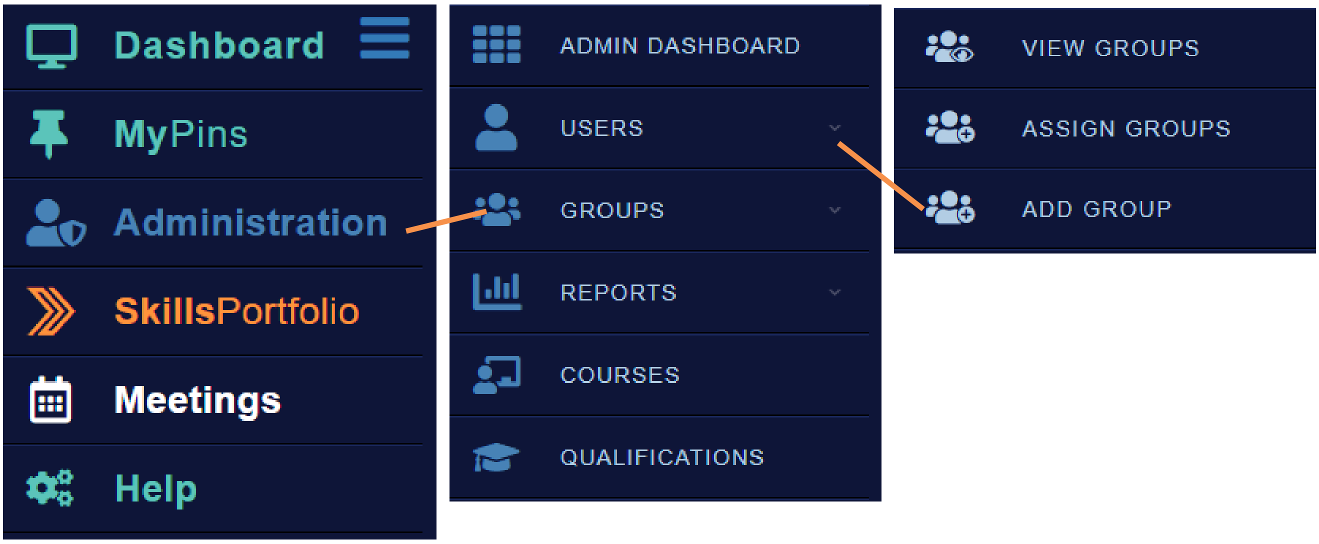
Username –create a username for your assessor, there are no rules it just needs to be bespoke as no two usernames can be the same.
Password – if you know what the assessors password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.
First name – specify the first name of your assessor.
Surname – specify the surname of your assessor.
Email address – specify the email address of your assessor if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

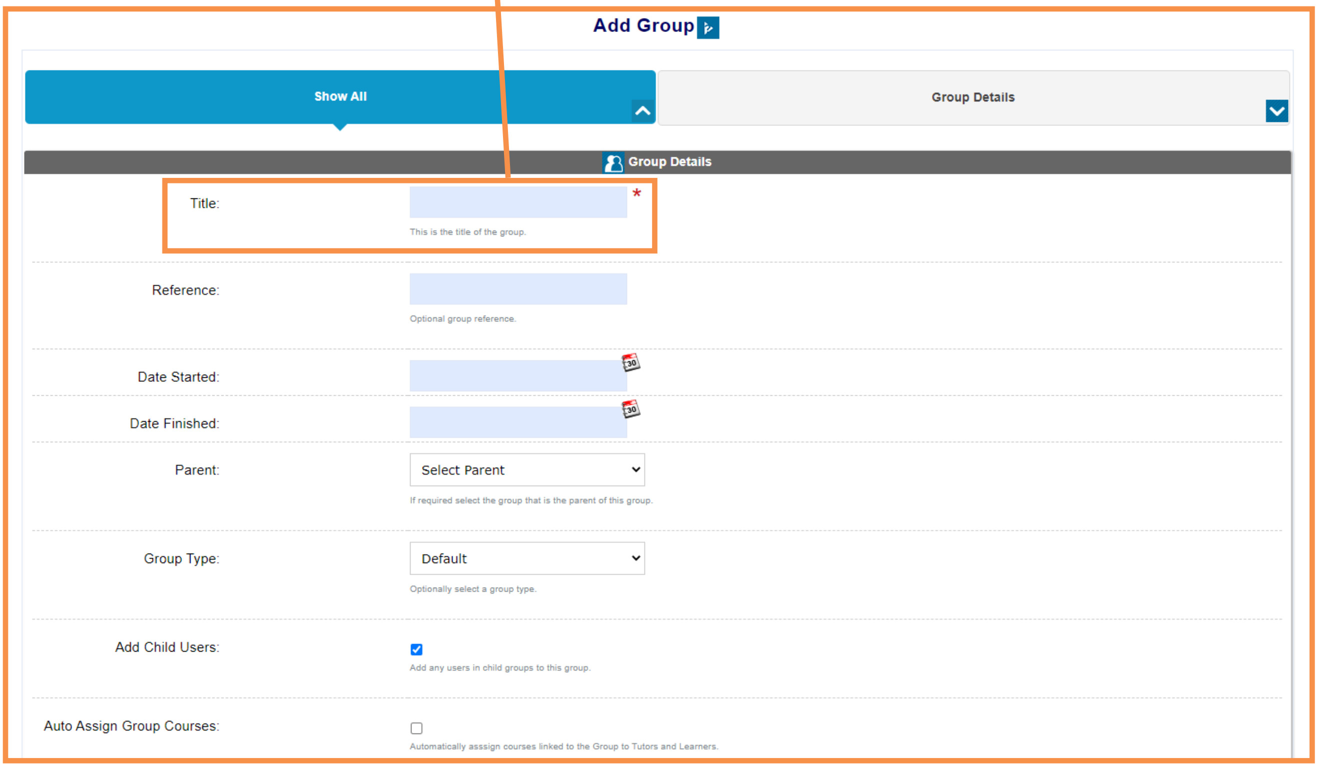
Select **Update** to finalise the creation of this account, all is left to do is create a group of learners for this assessor to access.

Process for the Creation of an Assessors Group of Learners

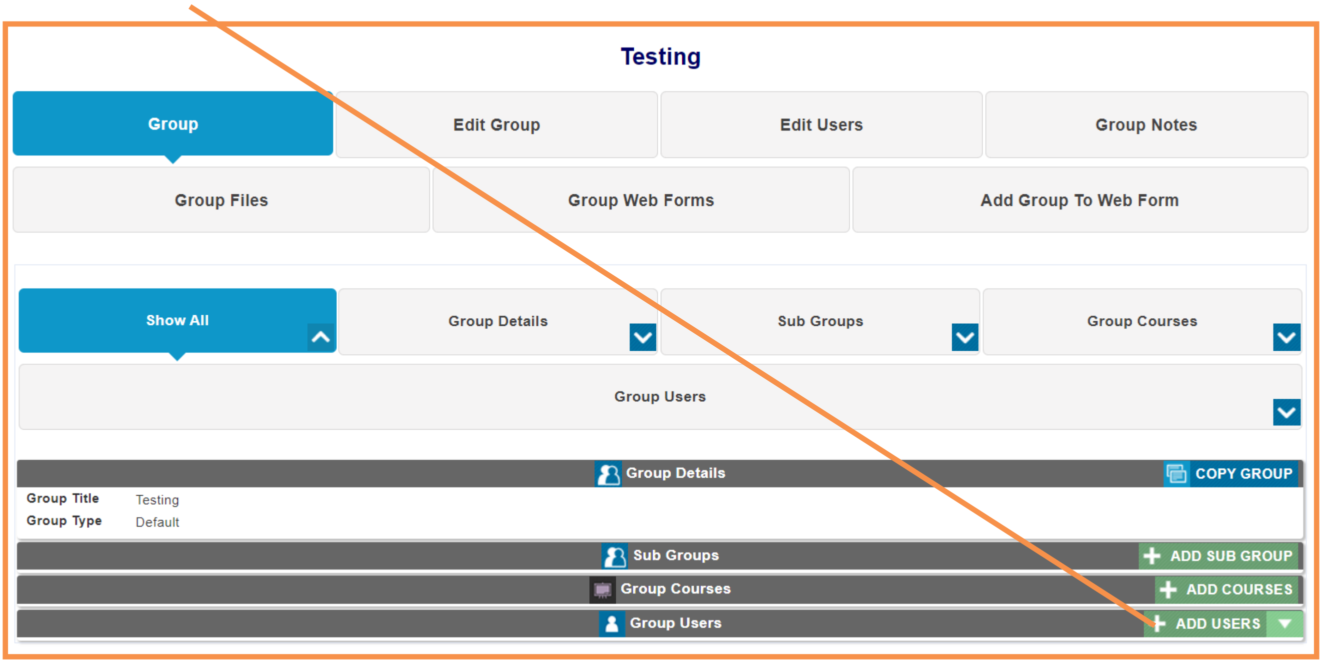
From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **group's** icon > Select **Add group**.



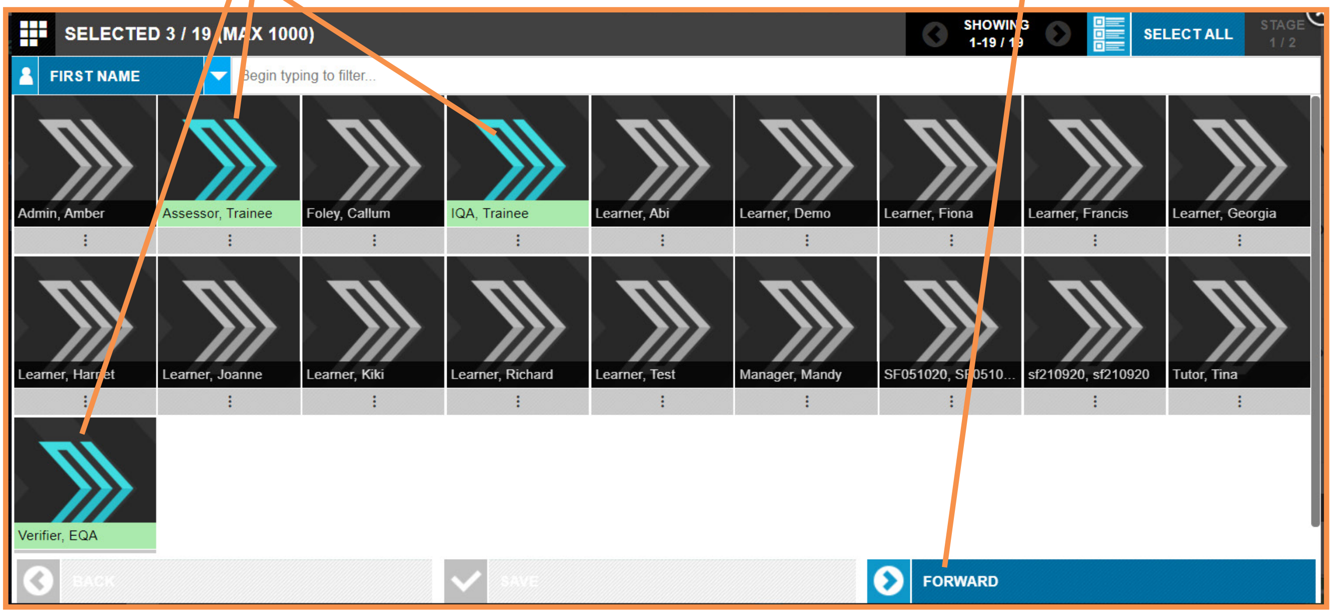
Proceed to give the group a **title** and select **Update** to finalise the creation.



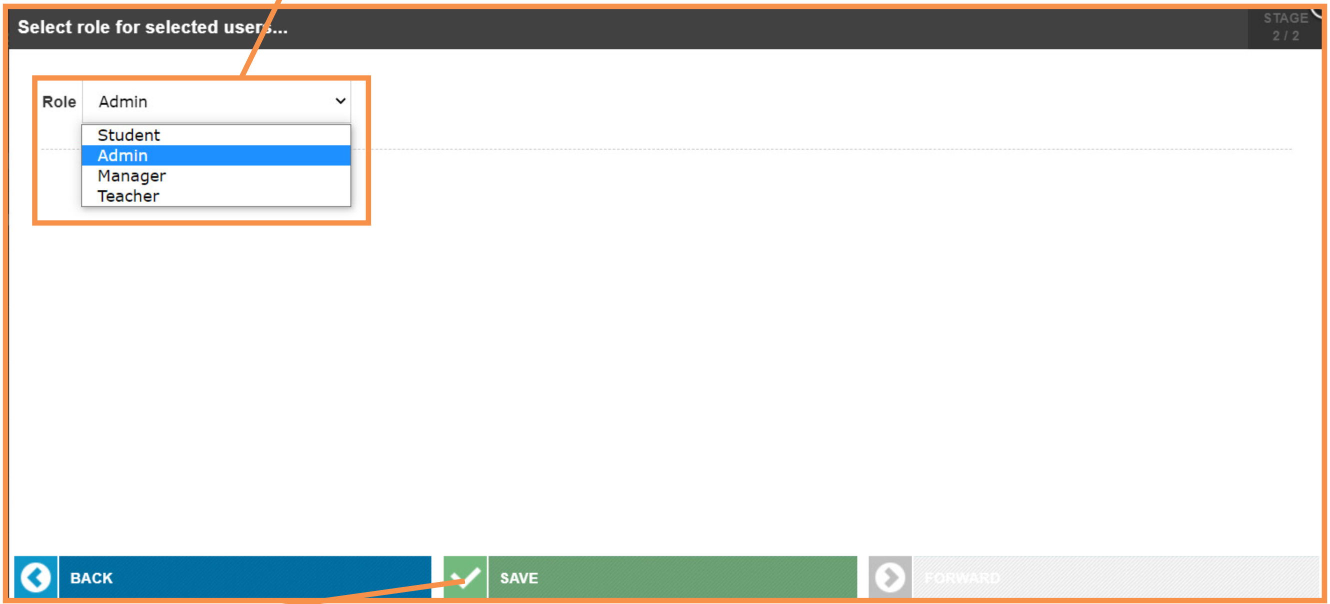
Select **Add Users**



Select the **Assessor/s** you would like for this group. Select **Forward**



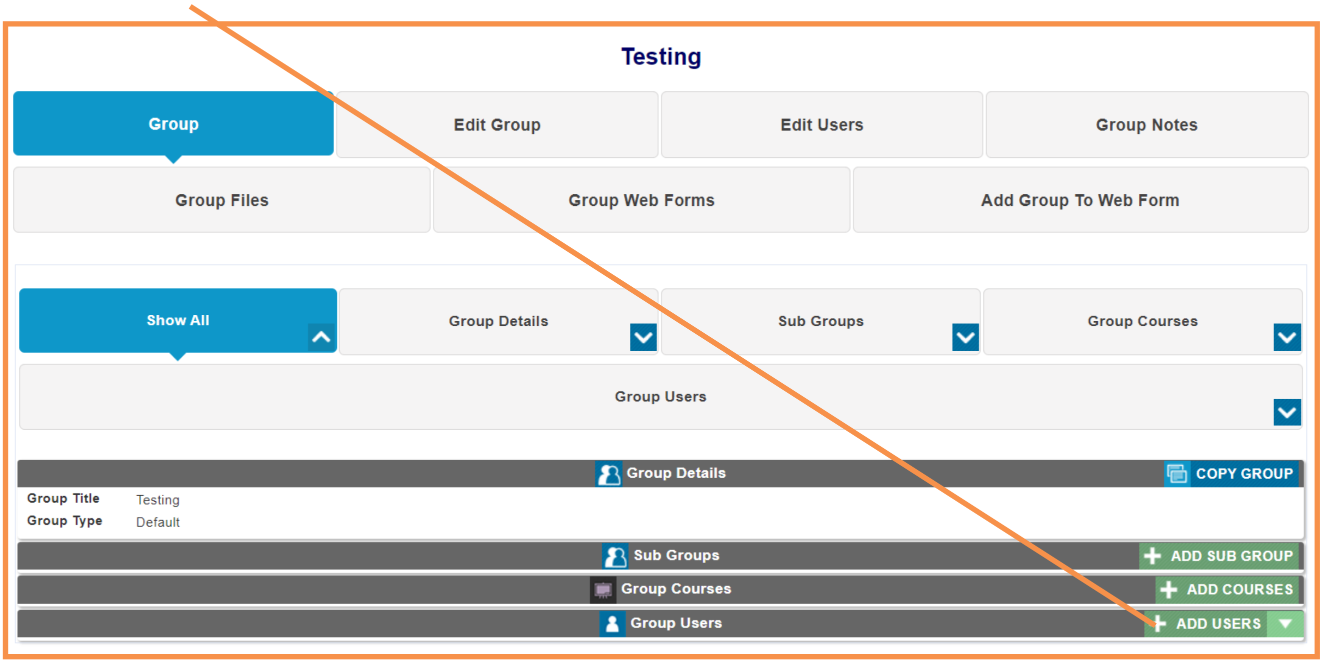
Select the **Admin role** from the dropdown.



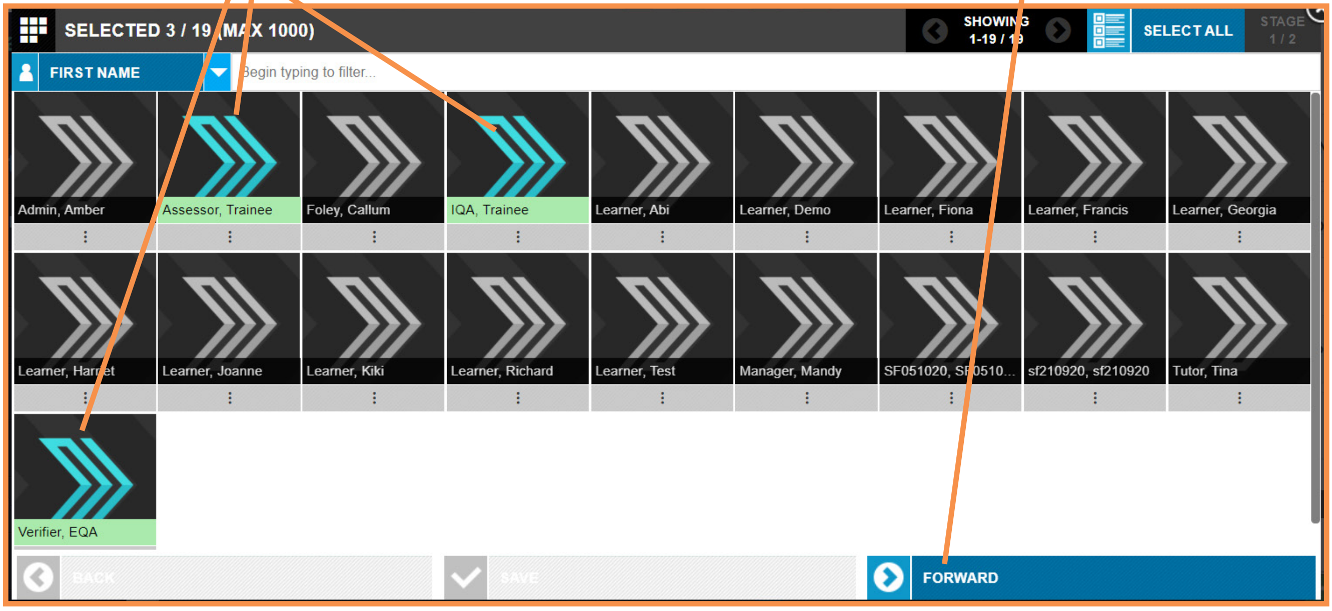
Select **Save** in order to assign an assessor to the group.

Adding Learners to a Group

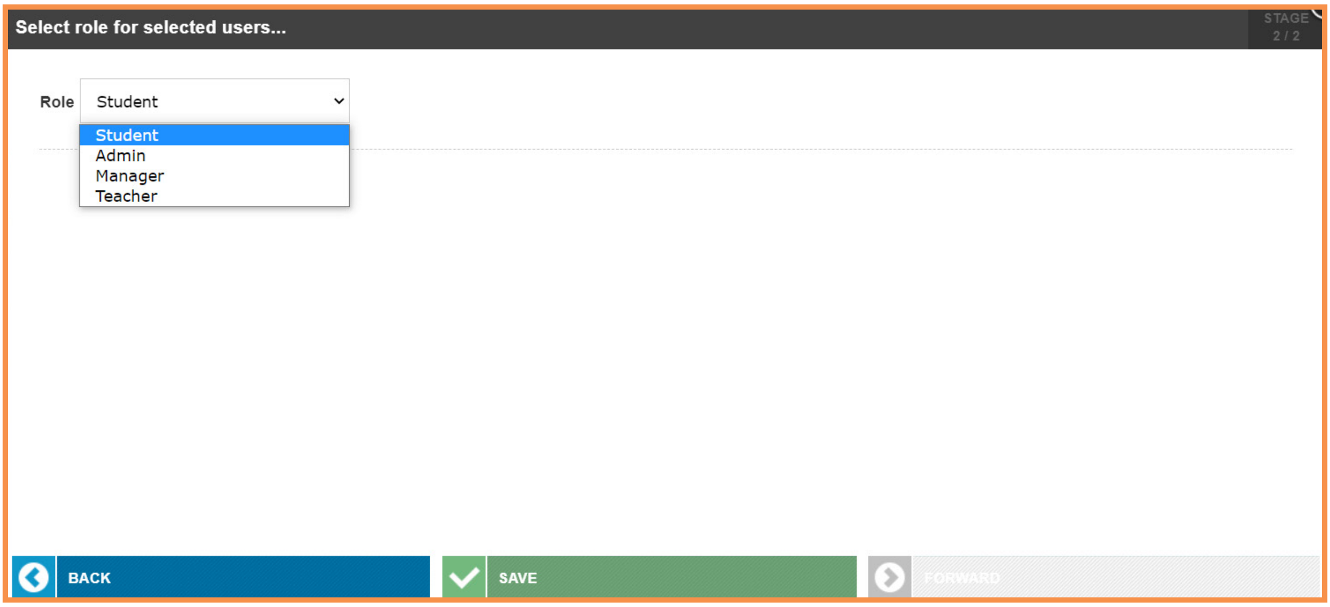
Select **Add Users**



Select the **Learner/s** you would like for this group. Select **Forward**



Select the **Student role** from the dropdown.

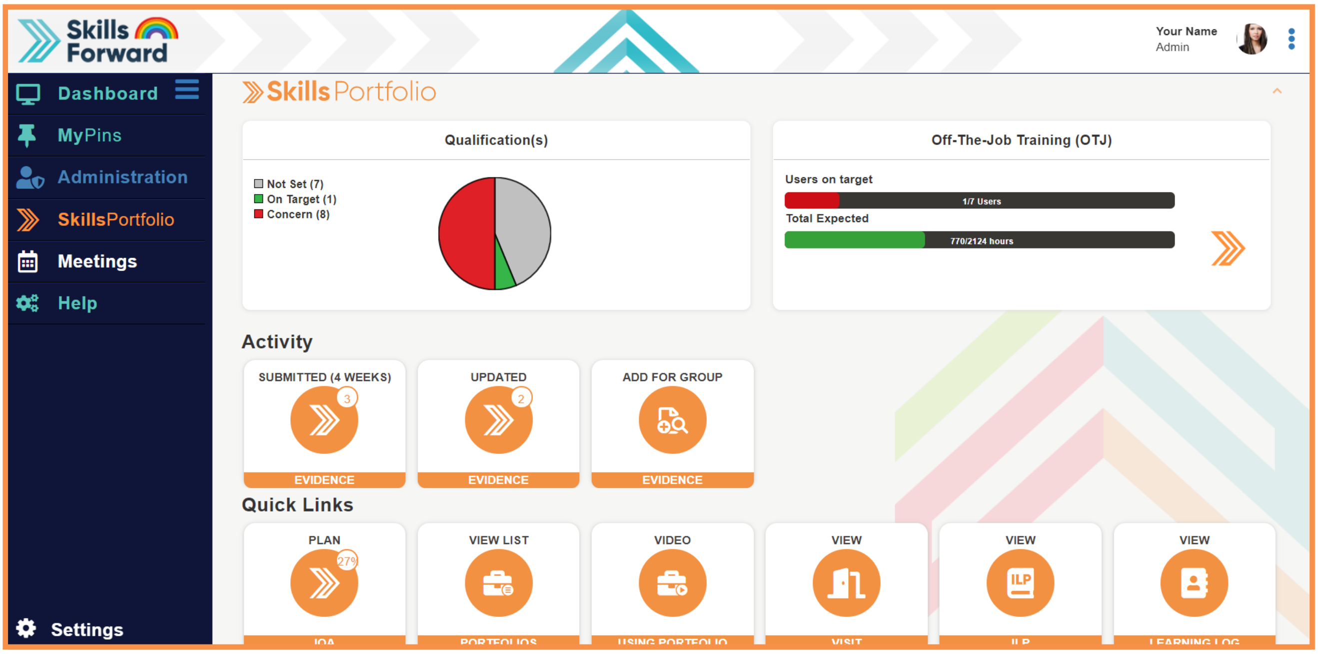


Select **Save** in order to assign an learners to the group.

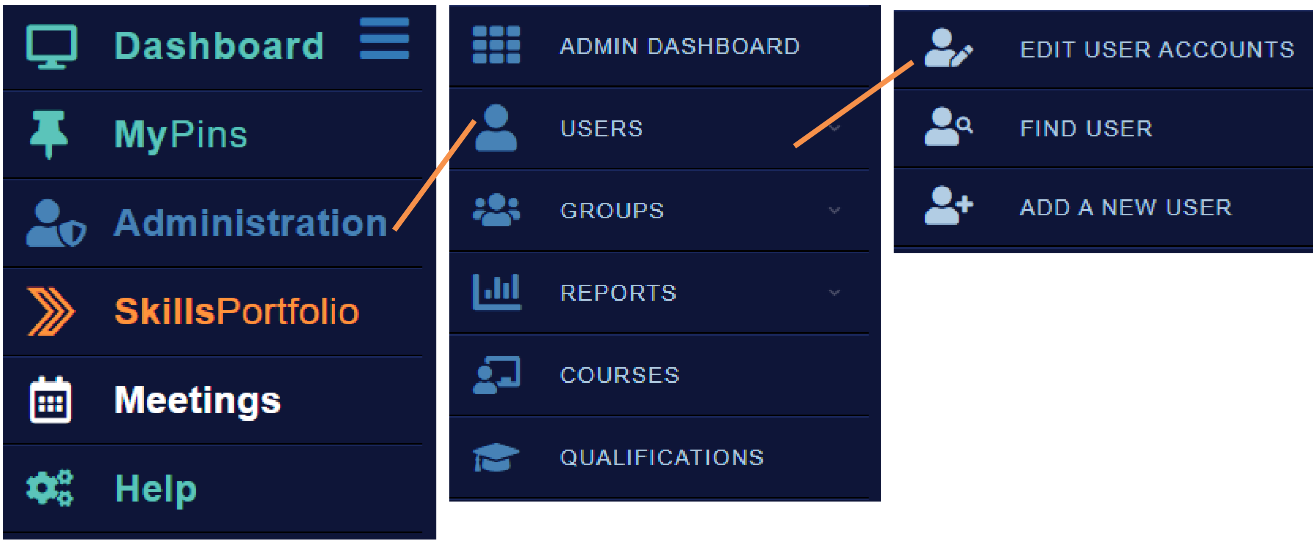
Repeat steps to add Learners on **page 10**, any time an assessor needs access to a new learner.

Navigate to a Learner's Profile/Portfolio

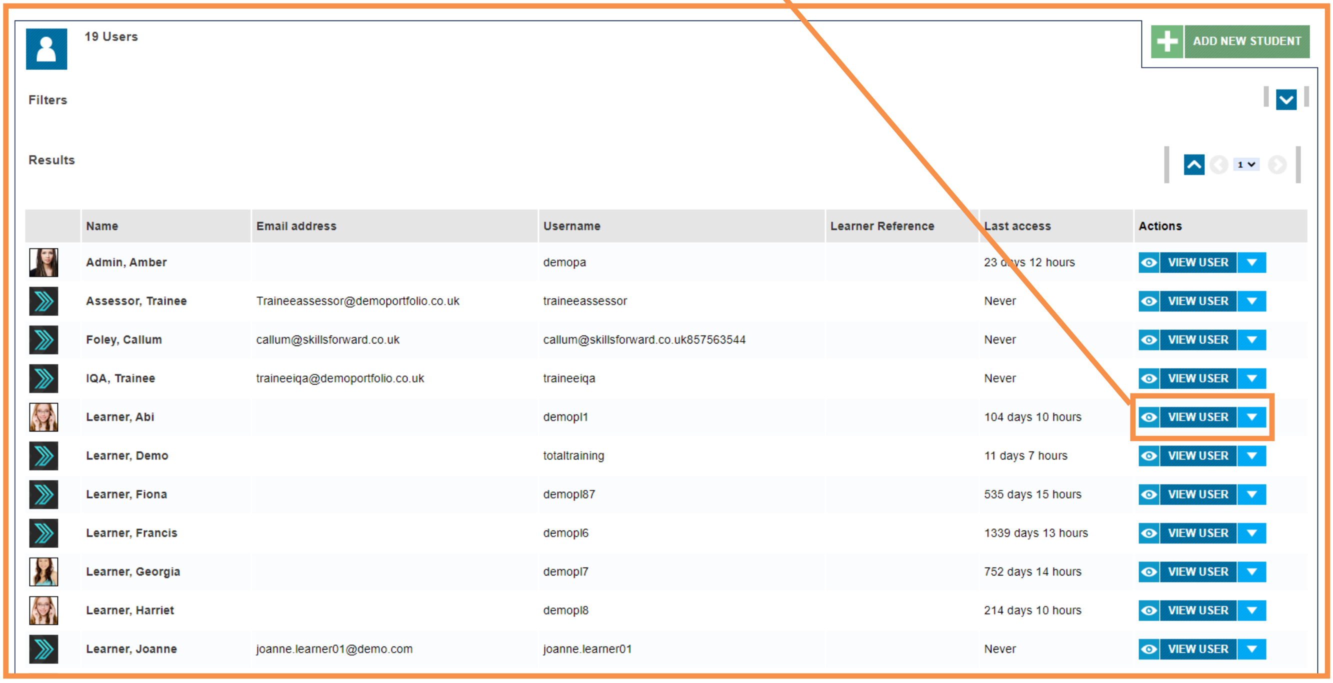
Having logged onto the platform you will arrive at the Dashboard which is your home page.



From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon >
Select **edit user account** to receive a list of all users.

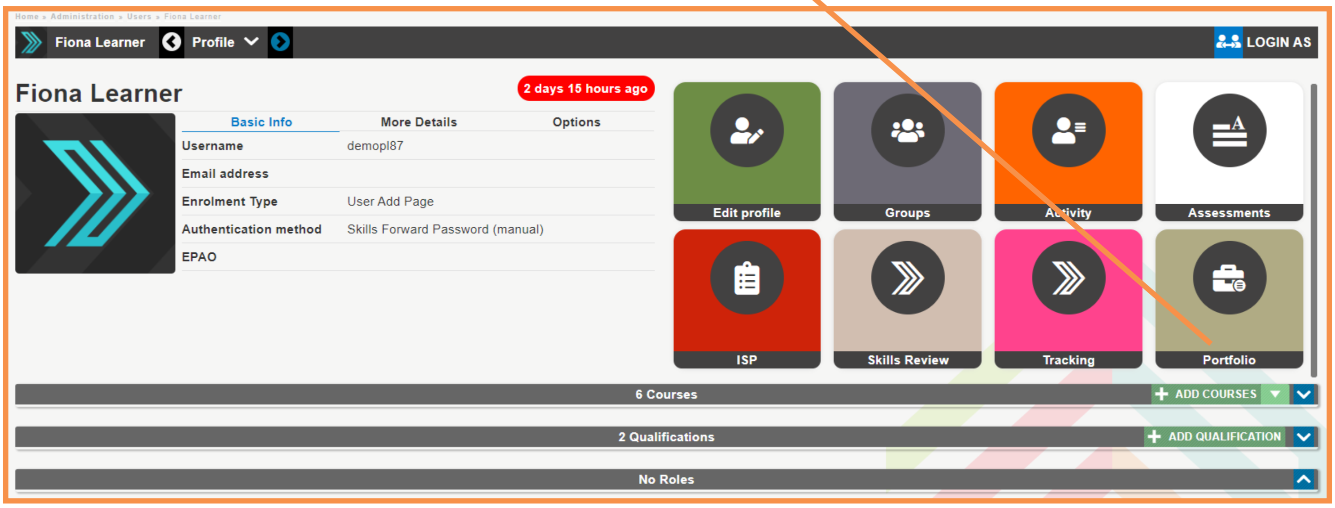


Find your Learner among the list, select **View User** to open a user profile.



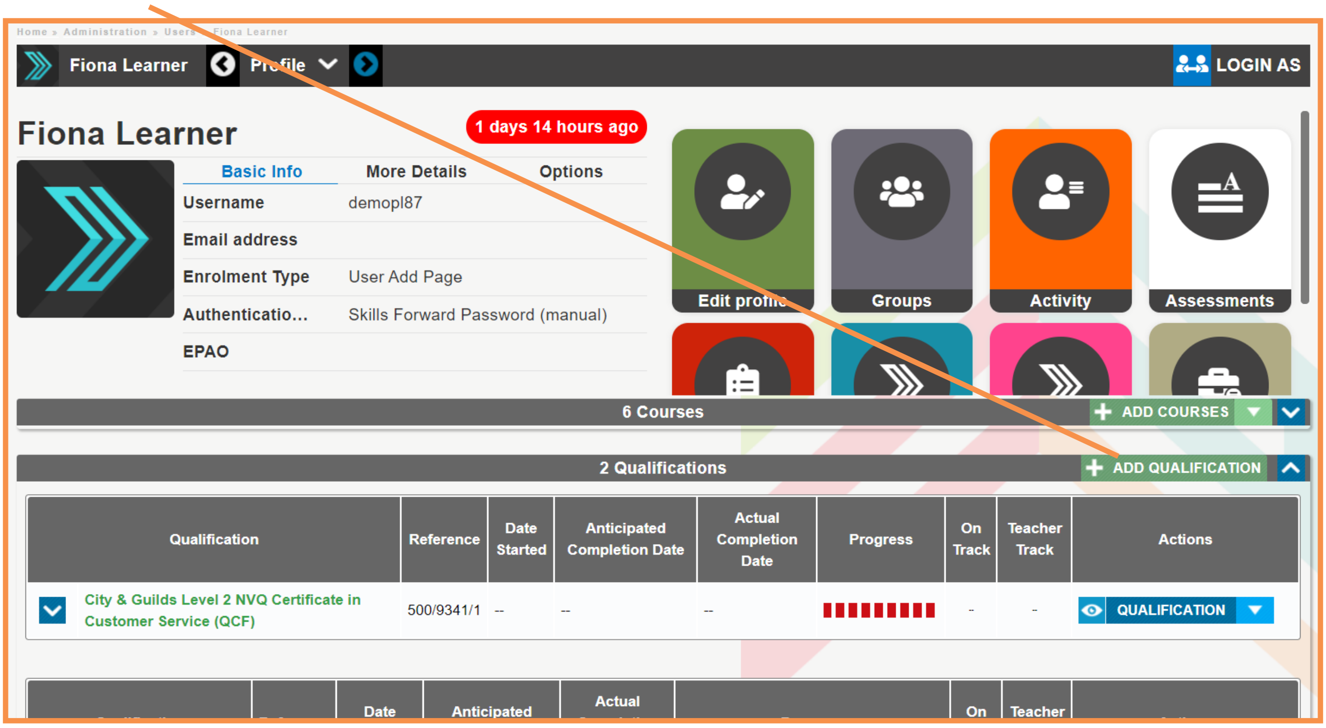
	Name	Email address	Username	Learner Reference	Last access	Actions
	Admin, Amber		demopa		23 days 12 hours	VIEW USER
	Assessor, Trainee	Traineeassessor@demoportfolio.co.uk	traineeassessor		Never	VIEW USER
	Foley, Callum	callum@skillsforward.co.uk	callum@skillsforward.co.uk857563544		Never	VIEW USER
	IQA, Trainee	traineeiqa@demoportfolio.co.uk	traineeiqa		Never	VIEW USER
	Learner, Abi		demopl1		104 days 10 hours	VIEW USER
	Learner, Demo		totaltraining		11 days 7 hours	VIEW USER
	Learner, Fiona		demopl87		535 days 15 hours	VIEW USER
	Learner, Francis		demopl6		1339 days 13 hours	VIEW USER
	Learner, Georgia		demopl7		752 days 14 hours	VIEW USER
	Learner, Harriet		demopl8		214 days 10 hours	VIEW USER
	Learner, Joanne	joanne.learner01@demo.com	joanne.learner01		Never	VIEW USER

Once on the Learners profile, select the **Portfolio tile** to be taken to there.

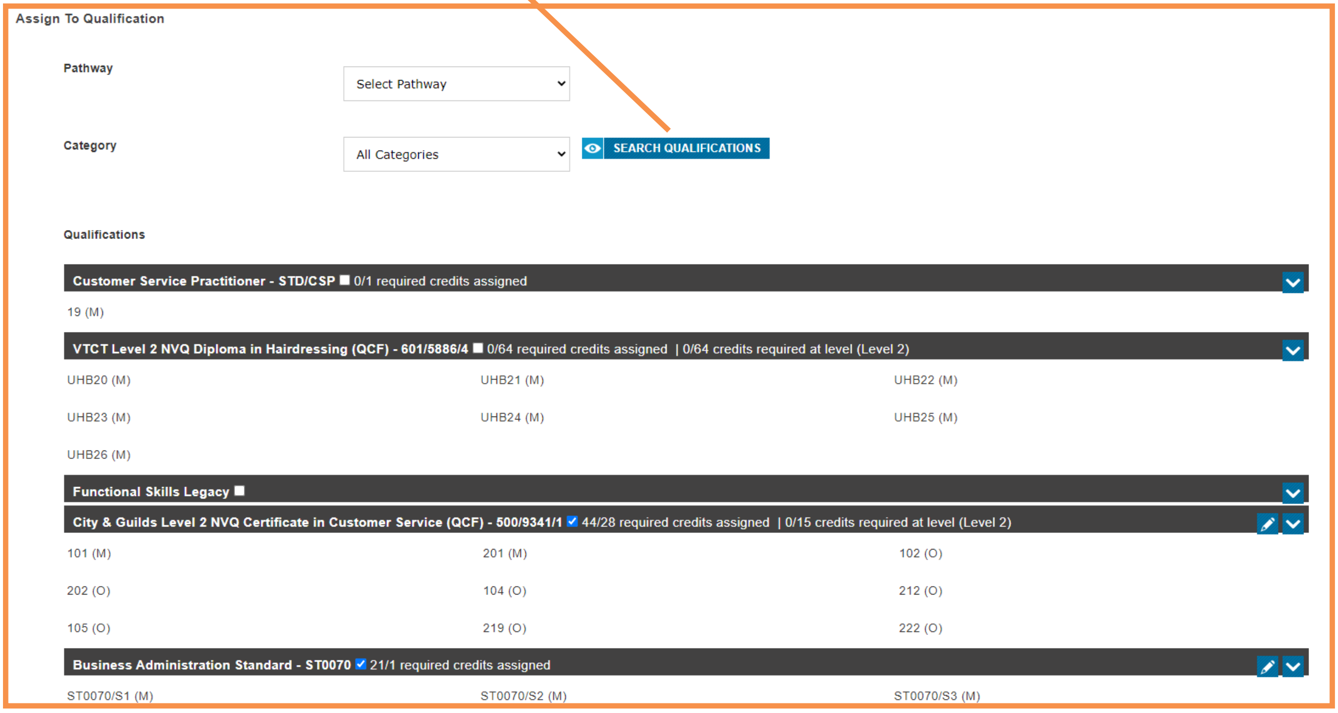


How to Assign a Qualification or Standard to a Learner

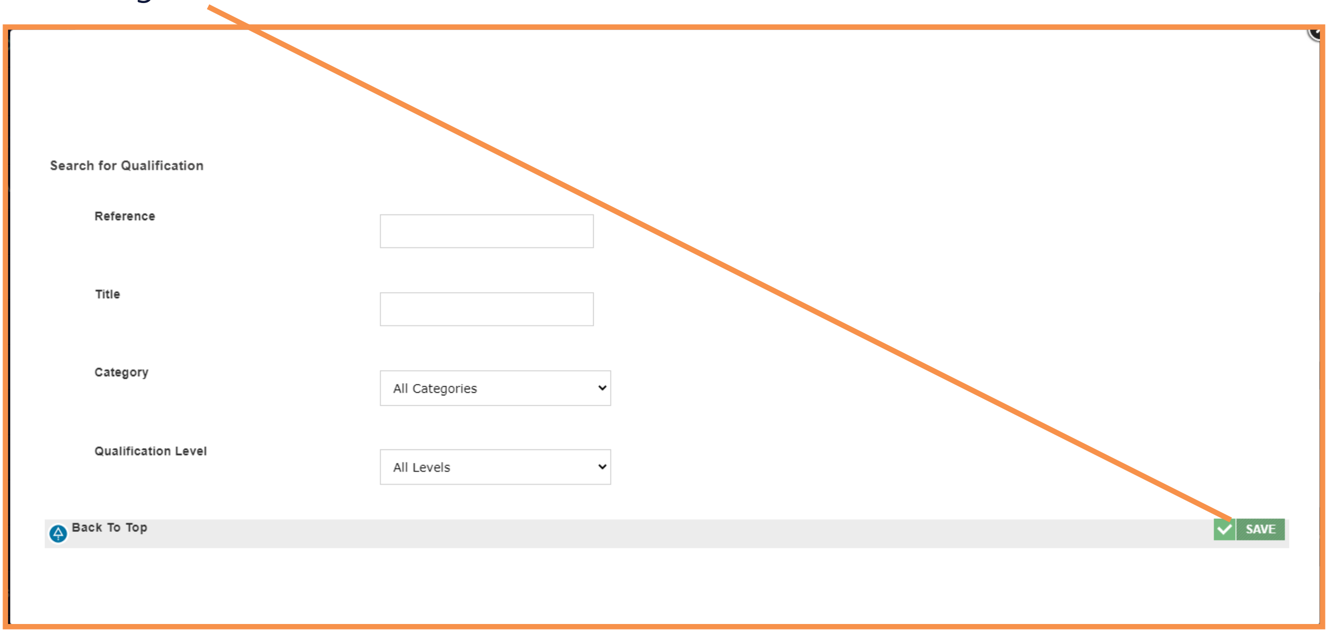
Navigate to the learners profile in question, On the learners profile select the **Add Qualification** button.



If a qualification has been assigned to another learner within your organisation, it will appear in this section already. In the event this is not the case, search for your qualification via the **blue button**.

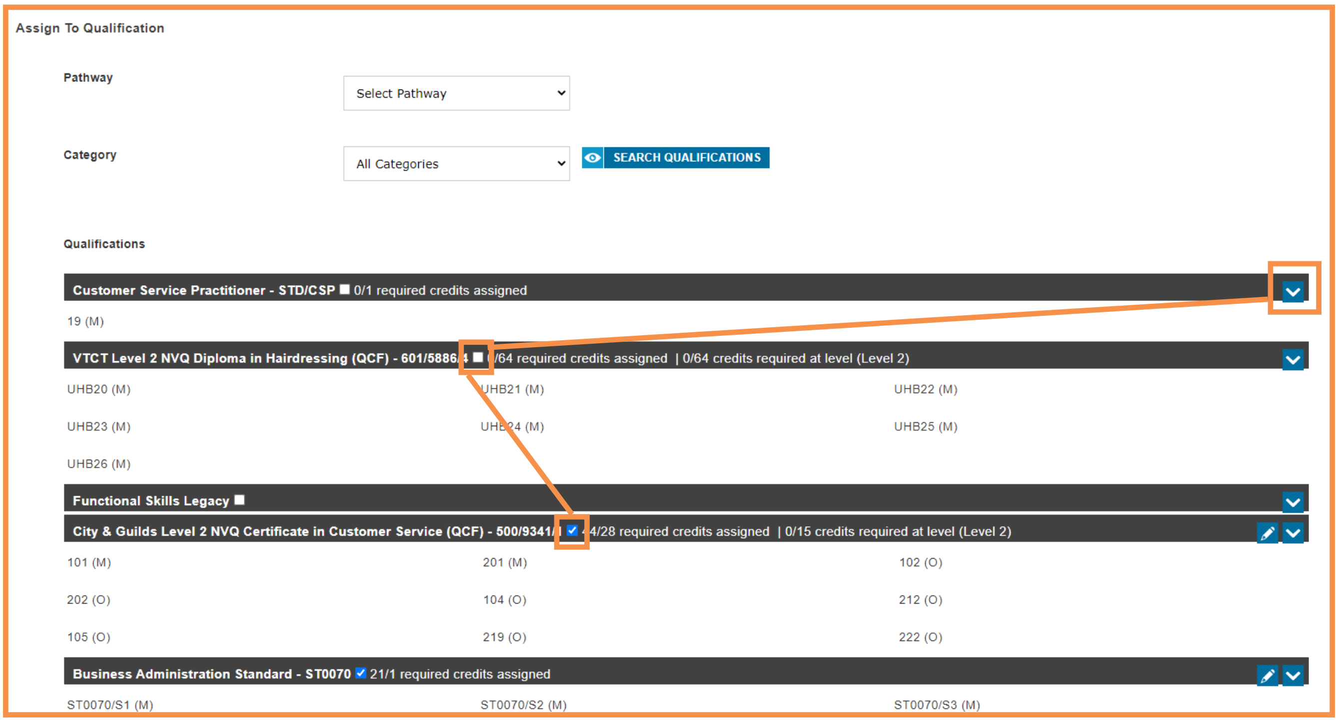


You can search for **qualification/standard** by specifying a **title** or **ref** and selecting **save**.

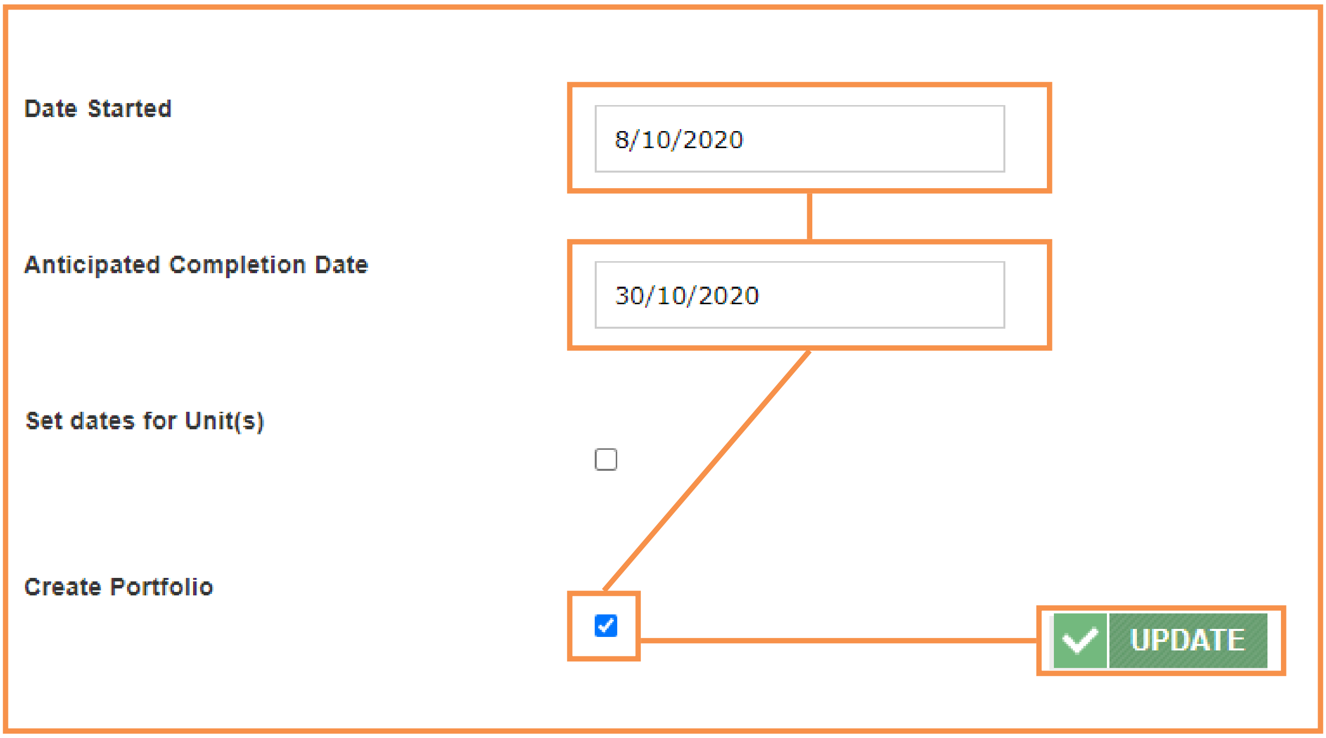


In the event your qual exists you will be able to use it from here. If not, raise a ticket to request the build of your qual.

Select the **blue dropdowns** and **tick** the optional units that relate to your learner once you have selected the qual of your choice.

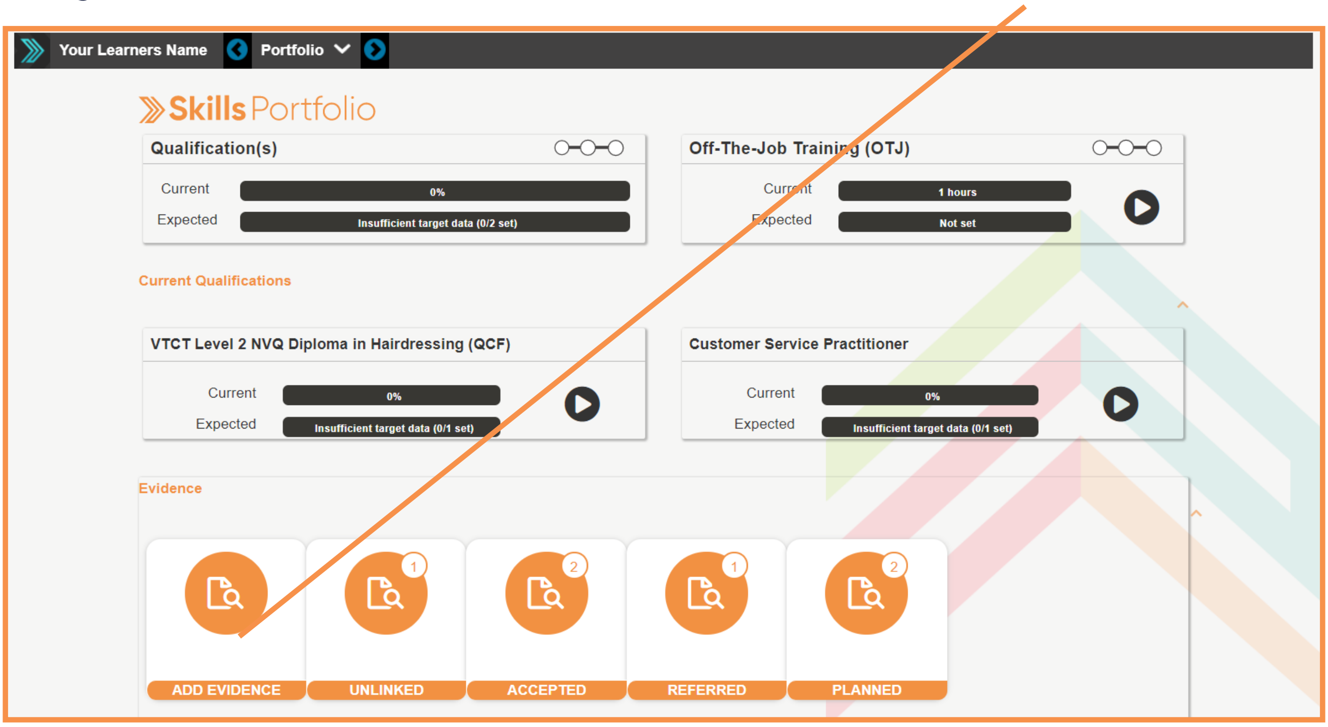


Specify the **start** and **completion date** for this learner.
Select the **Create Portfolio tick box.**
Select **Update** to finalise changes.

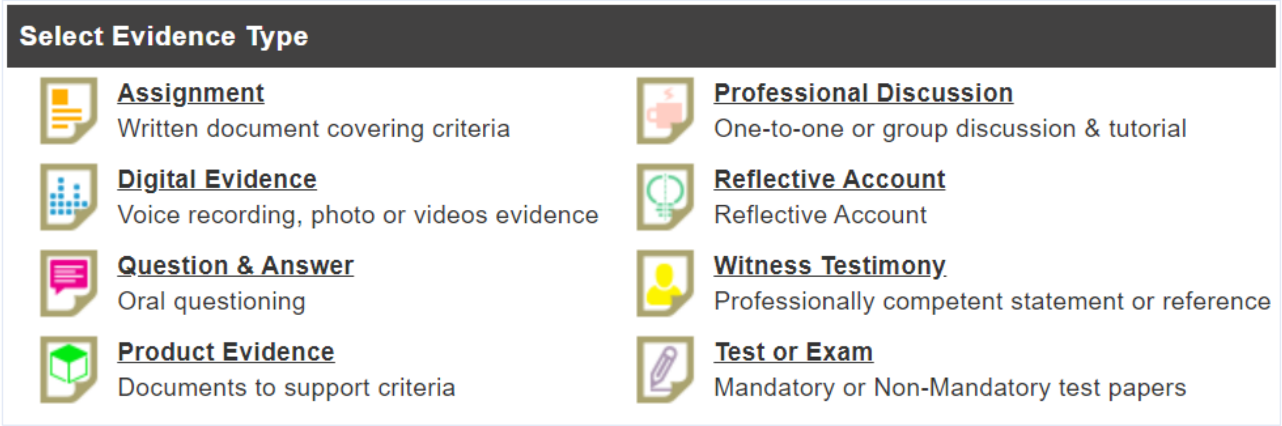


Upload Evidence on behalf of your Learner

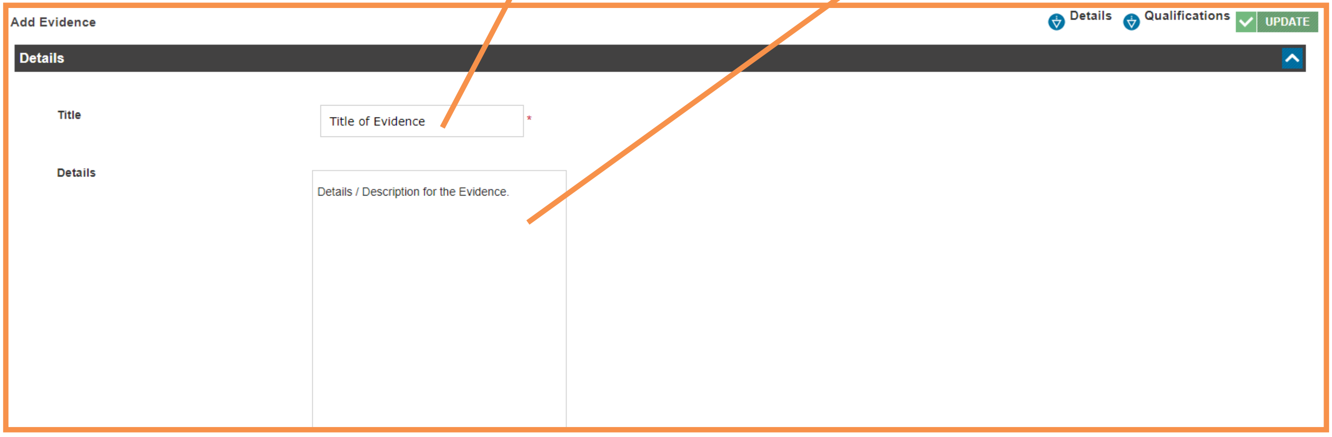
Navigate to the **Learners Portfolio.** Next select the **Add Evidence tile.**



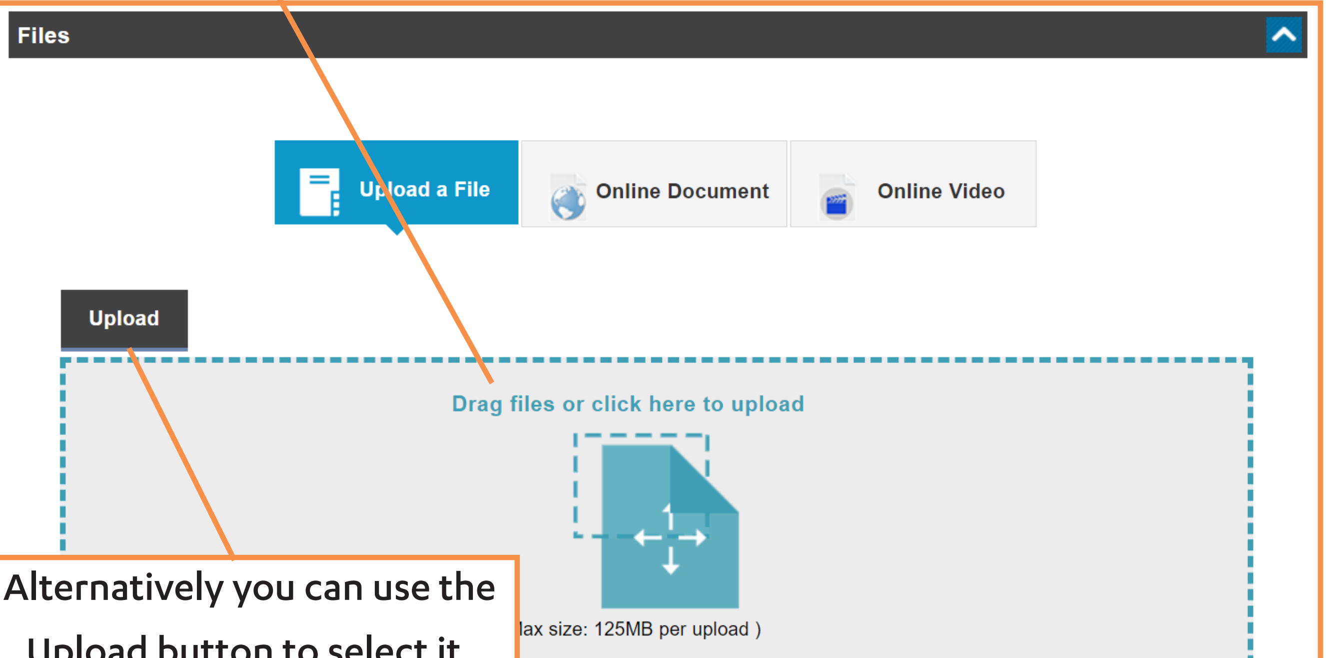
Select the **Evidence Type** from the options given.



Give your piece of evidence a **Title** and specify some **Details** surrounding the evidence you are uploading.



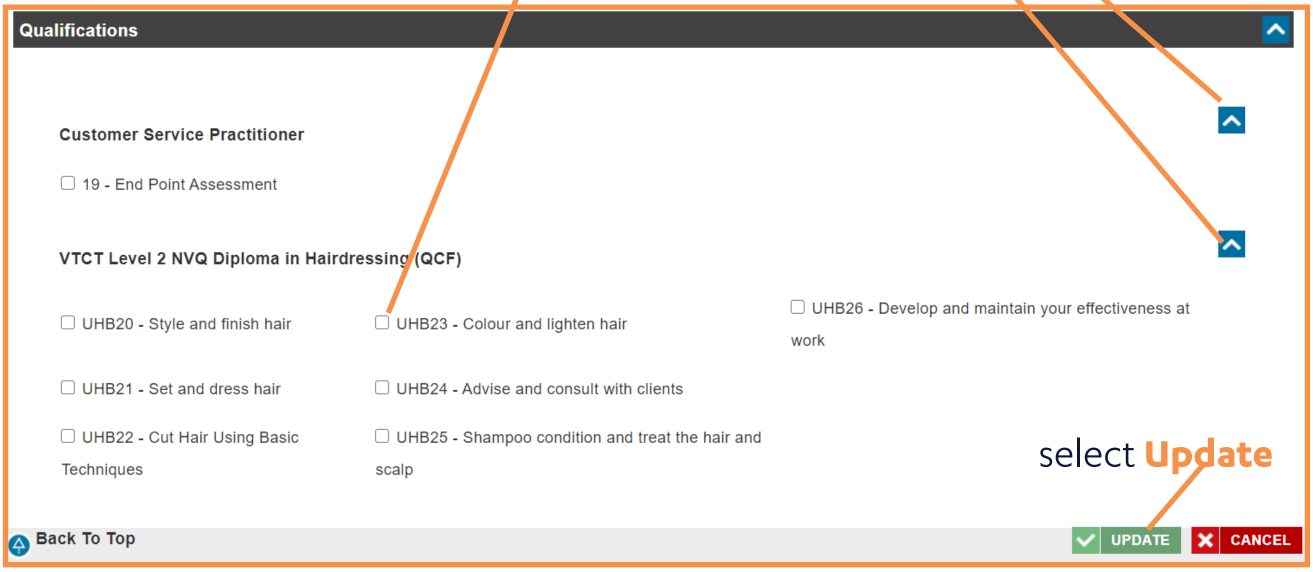
Drag and drop the file of evidence to the grey box with dotted lines section of this page.



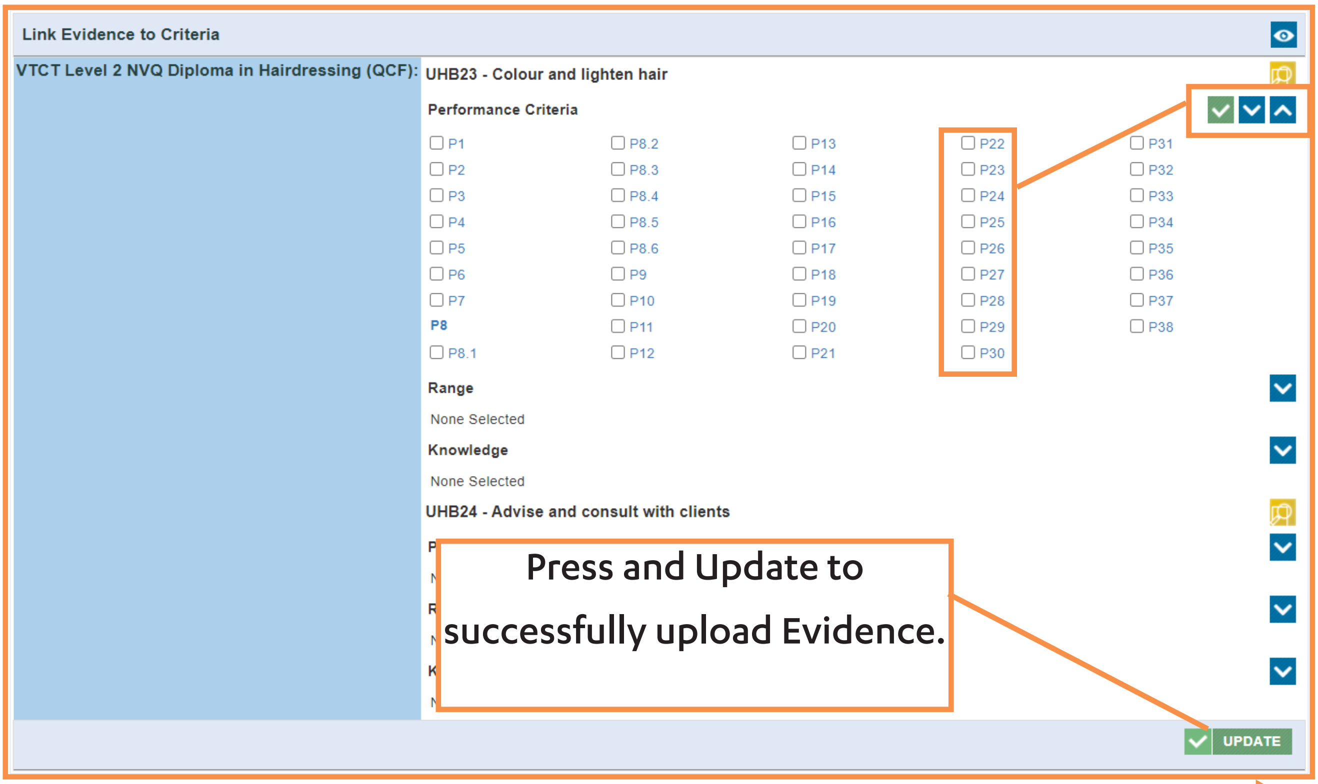
Alternatively you can use the Upload button to select it.

Map your criteria to the relevant criteria within the unit by using the **blue dropdowns** in relation to your specific unit.

Here you will be able to **check the tick box** in relation to the relevant unit.

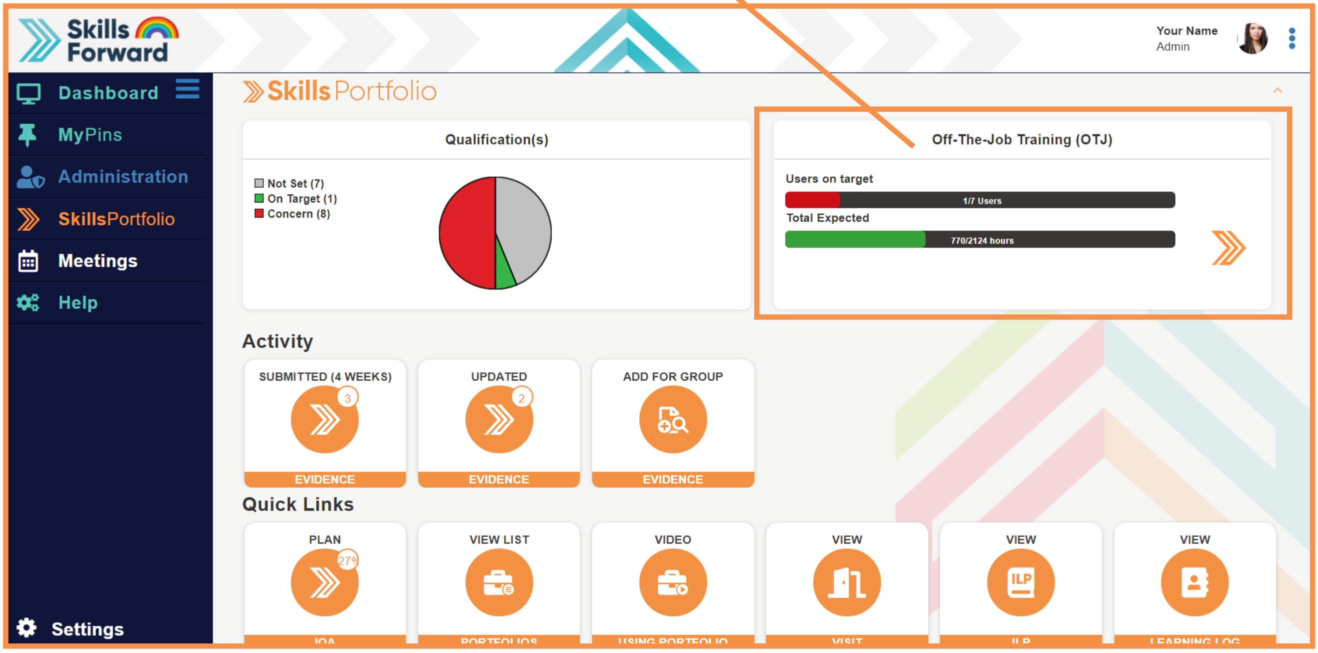


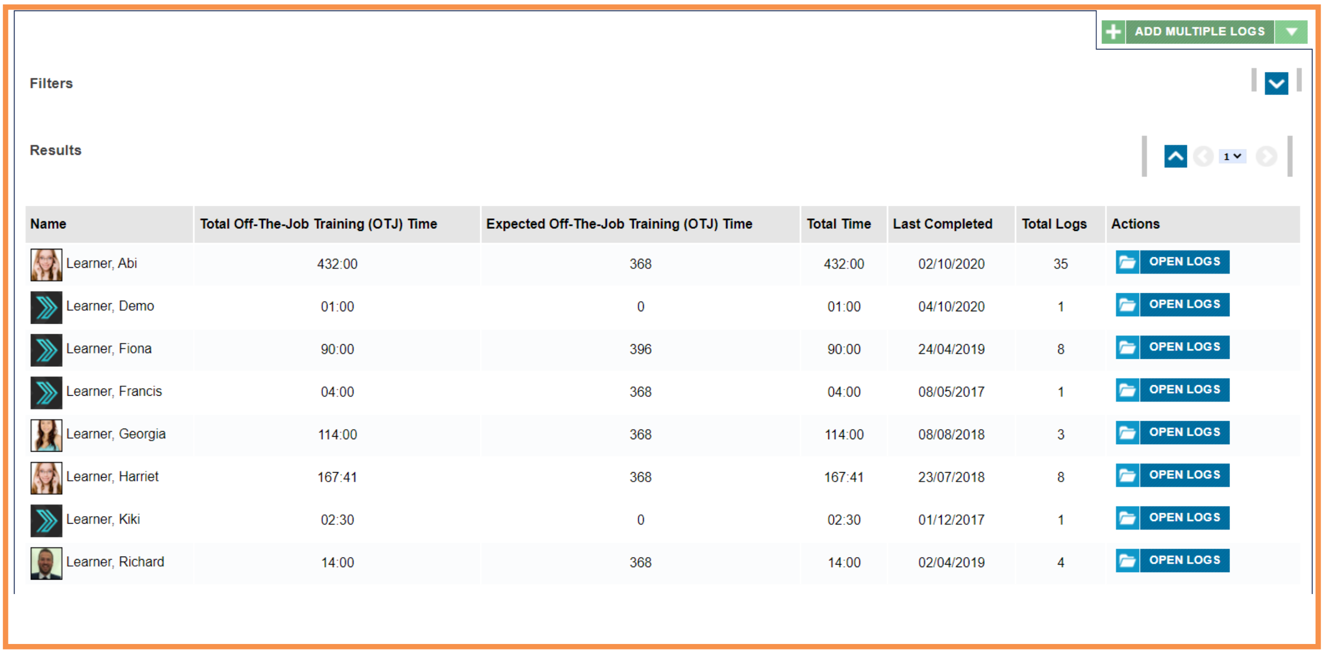
As the previous section to map your criteria to the relevant criteria within the unit by using the blue dropdowns in relation to your specific unit. Here you will be able to fill the tick box in relation to the relevant criteria.



View your Caseload/Learners OJT Progression

From your homepage select the **off the job training tile**.





ADD MULTIPLE LOGS

Filters

Results

Name	Total Off-The-Job Training (OTJ) Time	Expected Off-The-Job Training (OTJ) Time	Total Time	Last Completed	Total Logs	Actions
Learner, Abi	432:00	368	432:00	02/10/2020	35	OPEN LOGS
Learner, Demo	01:00	0	01:00	04/10/2020	1	OPEN LOGS
Learner, Fiona	90:00	396	90:00	24/04/2019	8	OPEN LOGS
Learner, Francis	04:00	368	04:00	08/05/2017	1	OPEN LOGS
Learner, Georgia	114:00	368	114:00	08/08/2018	3	OPEN LOGS
Learner, Harriet	167:41	368	167:41	23/07/2018	8	OPEN LOGS
Learner, Kiki	02:30	0	02:30	01/12/2017	1	OPEN LOGS
Learner, Richard	14:00	368	14:00	02/04/2019	4	OPEN LOGS

Here you will be able to see a page that lists your learners, the **first column** in the list will inform you of a learners **total off the job training hours**.

The **second column** in the list will specify the **hours of off- the job training** expected of this learner, you could use this to measure progress.

The **fourth column** will specify the **date** in which this learner last completed OJT.

To open **all of a learners logs** be sure to select the **open logs button** in the **7th column** of this page, if there is no button next to the learner this would indicate there are no logs

ADD MULTIPLE LOGS

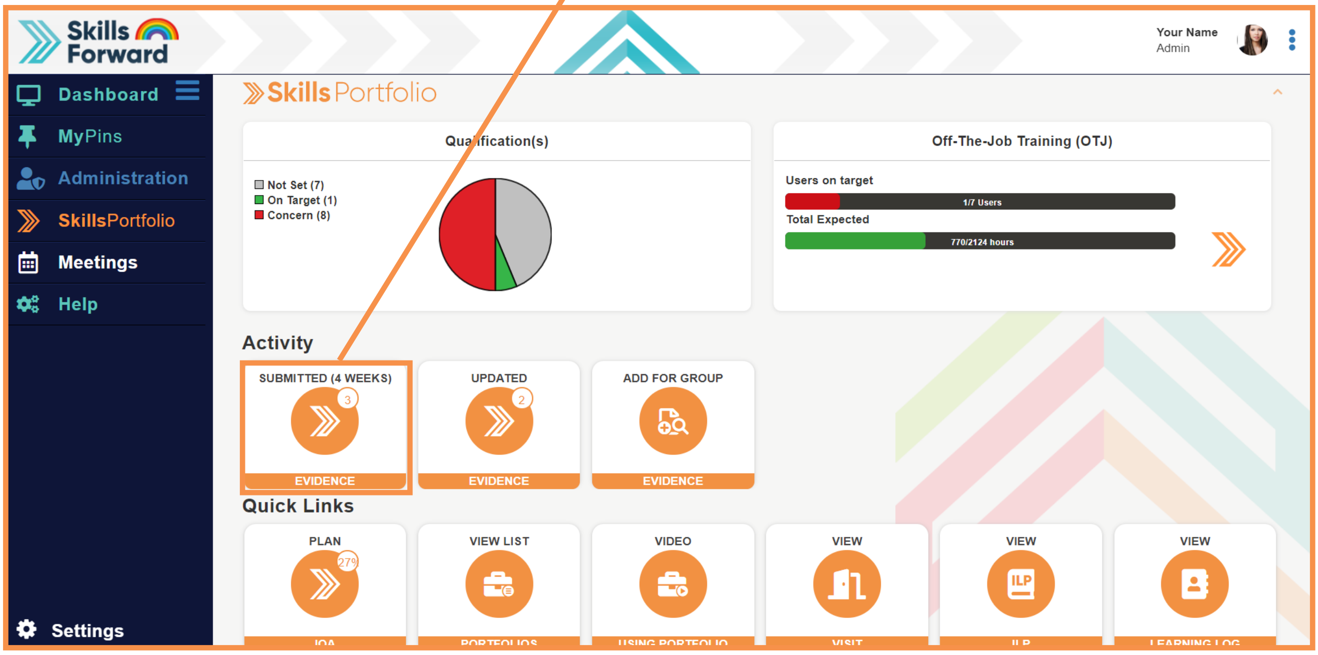
Filters

Results

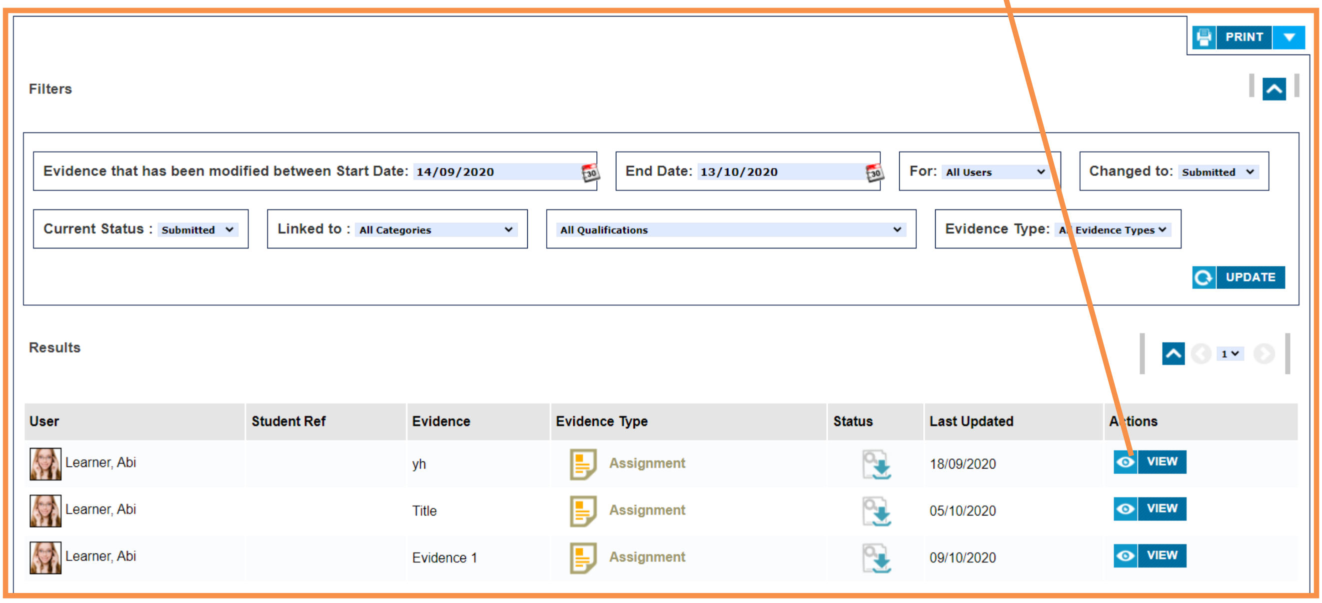
Name	Total Off-The-Job Training (OTJ) Time	Expected Off-The-Job Training (OTJ) Time	Total Time	Last Completed	Total Logs	Actions
Learner, Abi	432:00	368	432:00	02/10/2020	35	OPEN LOGS
Learner, Demo	01:00	0	01:00	04/10/2020	1	OPEN LOGS
Learner, Fiona	90:00	396	90:00	24/04/2019	8	OPEN LOGS
Learner, Francis	04:00	368	04:00	08/05/2017	1	OPEN LOGS
Learner, Georgia	114:00	368	114:00	08/08/2018	3	OPEN LOGS
Learner, Harriet	167:41	368	167:41	23/07/2018	8	OPEN LOGS
Learner, Kiki	02:30	0	02:30	01/12/2017	1	OPEN LOGS
Learner, Richard	14:00	368	14:00	02/04/2019	4	OPEN LOGS

How to Assess/Mark Submitted Evidence

From homepage select the **Submitted tile** in the activity section.

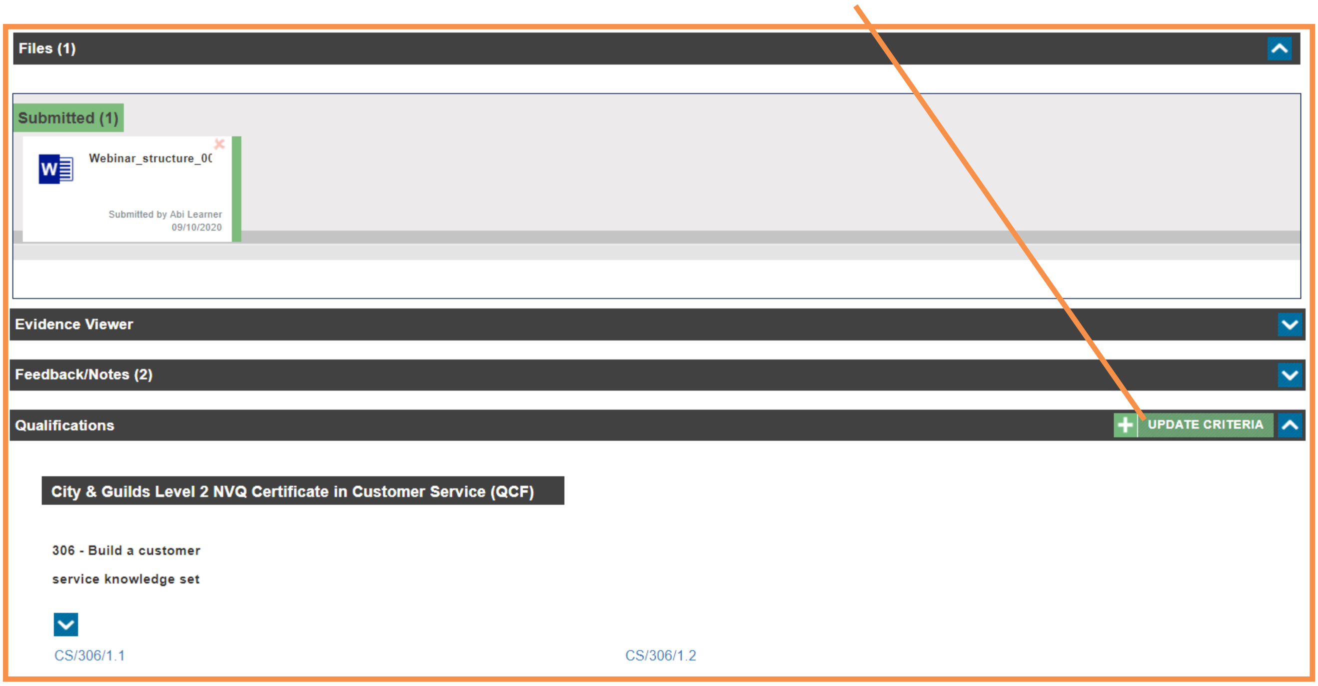


Here you will be able to see every piece of evidence that has the status of submitted, to begin the process of marking, select the **View button**.

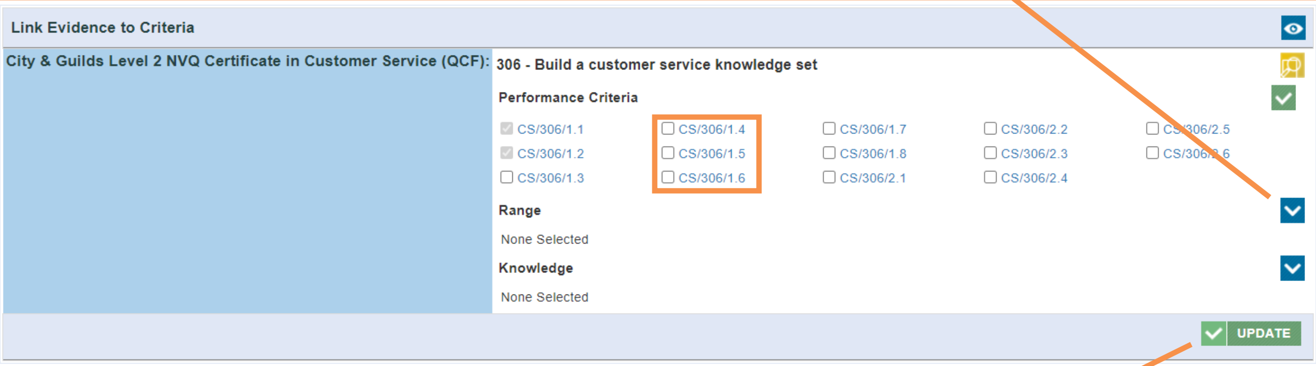


Here will be the details of the piece of evidence that has been submitted. Firstly, select on the attached file, where applicable in order to access it externally to the platform.

Having reviewed the evidence map to the unit(s)/criteria in which the learner is assigned to. To begin this process select the **Update Criteria** button.

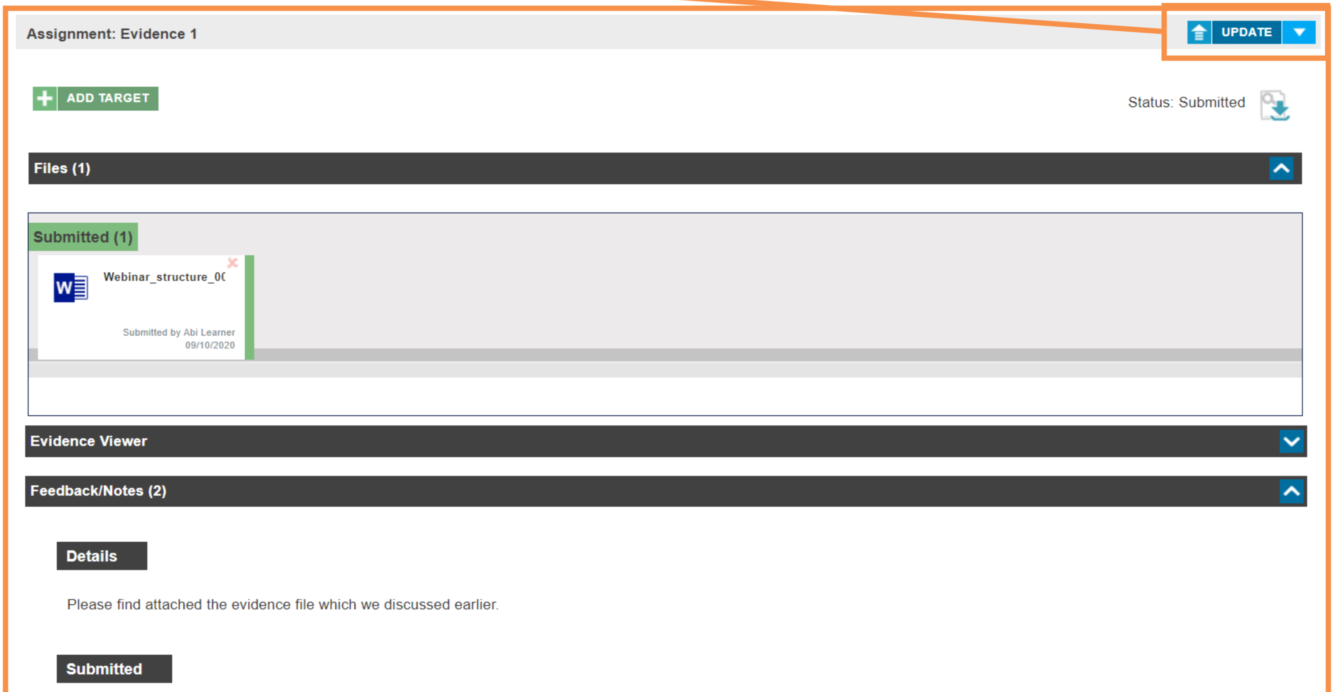


Use a **blue dropdown** on the relevant qualification/standard in order to view the units within the qualification/standard and choose accordingly.



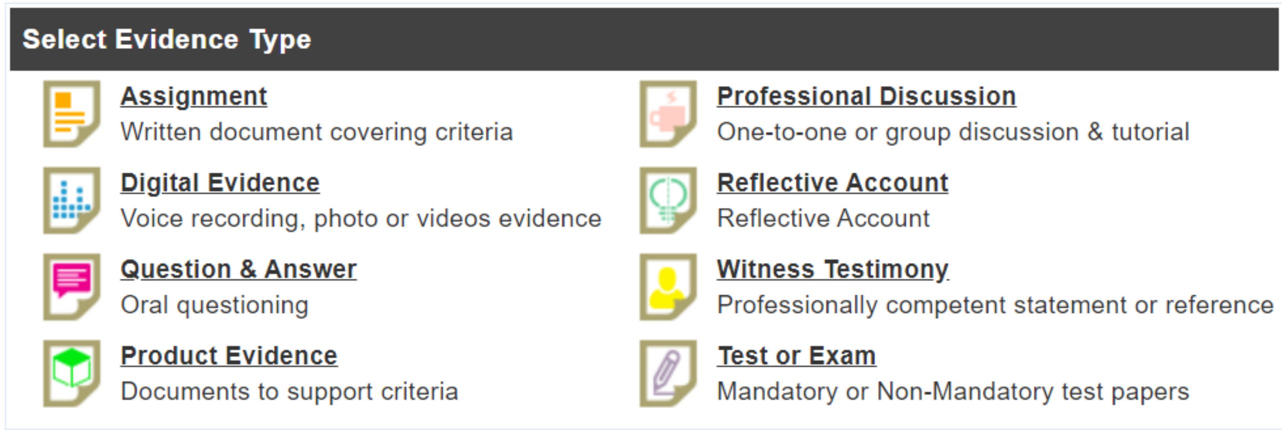
Select **Update**.

To mark the evidence, return to the evidence page you would like to mark and Select the blue **Update** button.



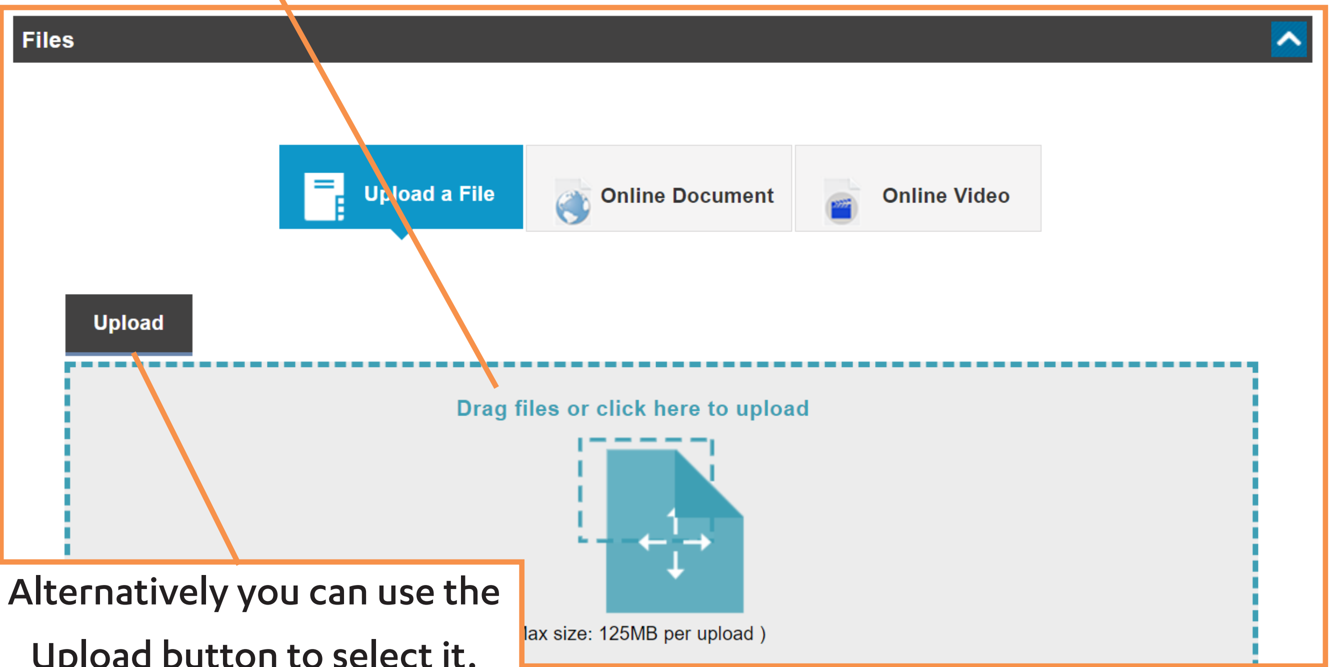
Select the **Status** you would like to mark the evidence from the dropdown and select **Submit** in order to finalise the marking of this piece of evidence.

Select the **Evidence Type** from the options given.



Give your piece of evidence a **Title** and specify some **Details** surrounding the evidence you are uploading.

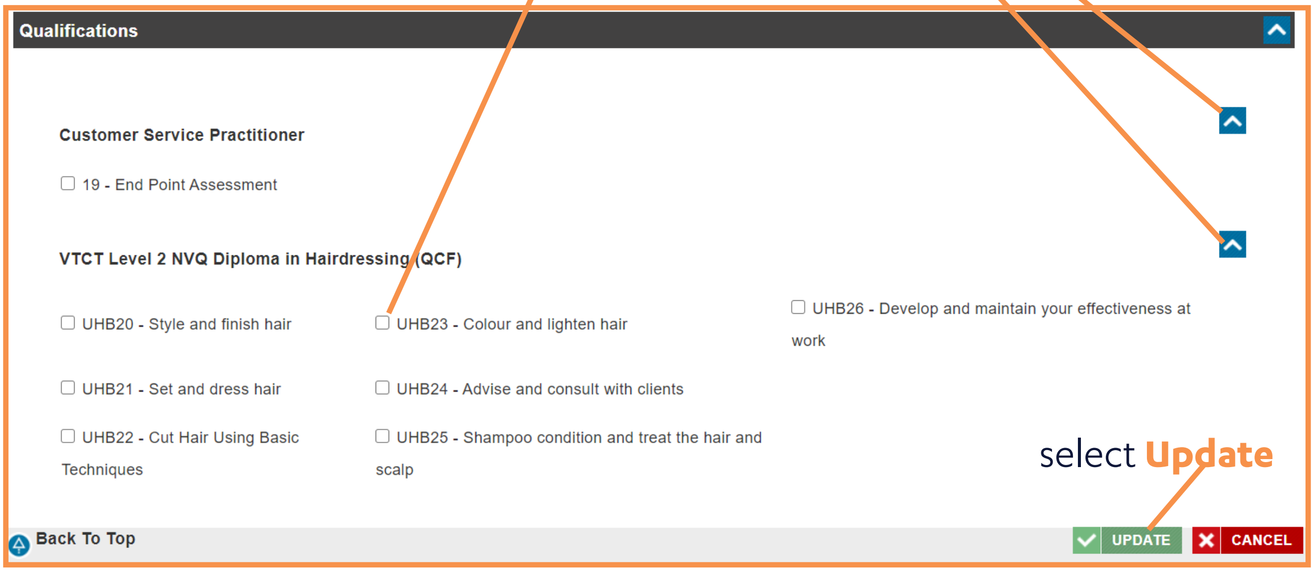
Drag and drop the file of evidence to the grey box with dotted lines section of this page.



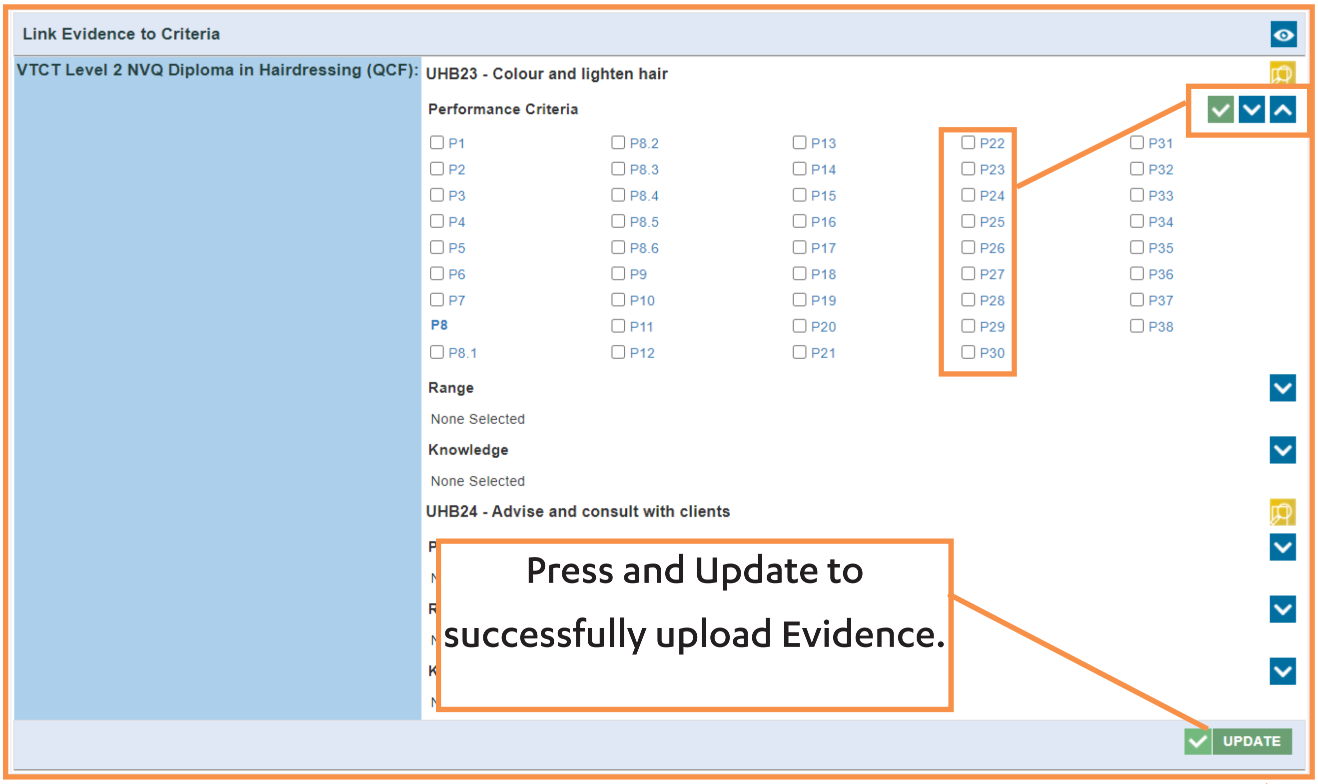
Alternatively you can use the Upload button to select it.

If you training provider have requested this to be set, map your criteria to the relevant qualification unit by using the **blue dropdowns** in relation to your specific qualification.

Here you will be able to **check the tick box** in relation to the relevant unit.



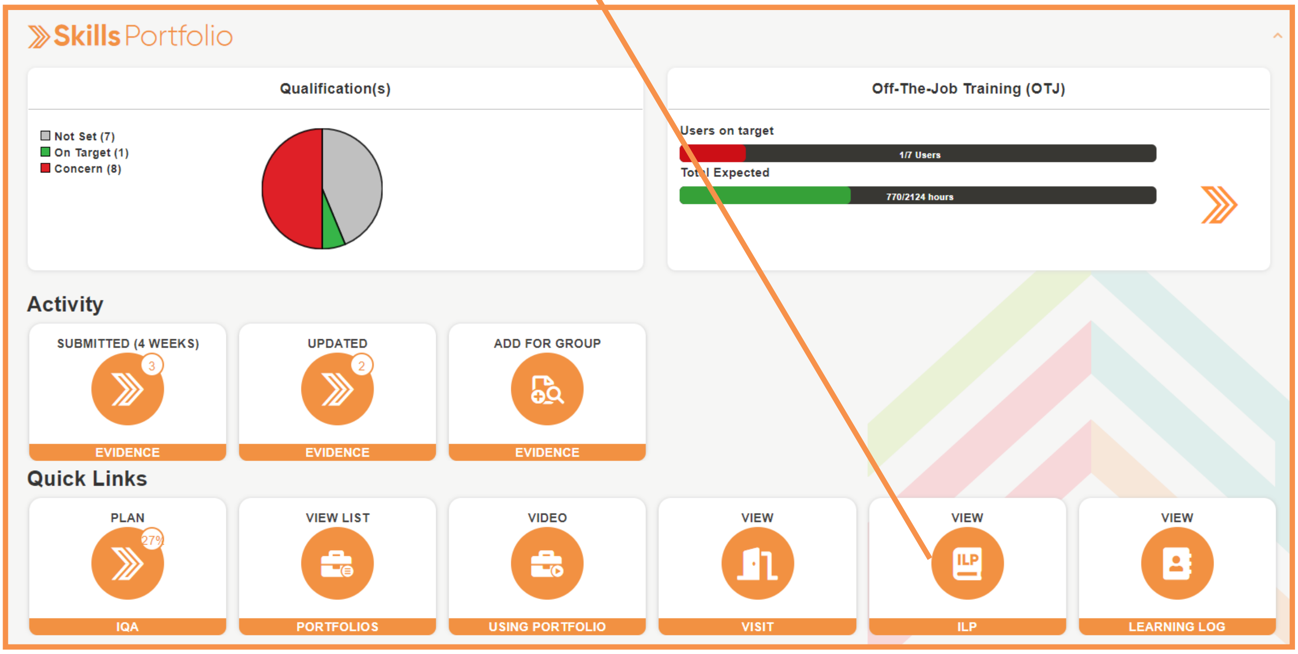
As the previous section to map your criteria to the relevant criteria within the unit by using the blue dropdowns in relation to your specific unit. Here you will be able to fill the tick box in relation to the relevant criteria.



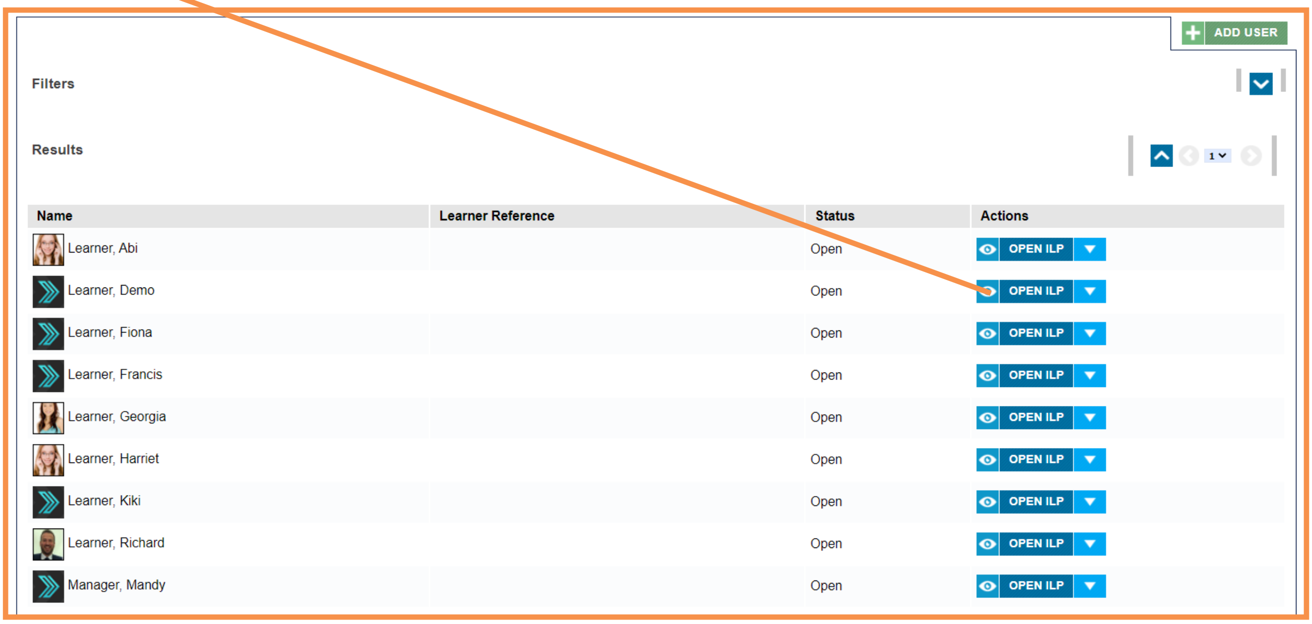
How to Complete/View an ILP (Individual Learner Plan)

Skills forward allows you to document this electronically via our default, editable ILP. If you have an ILP or your own you wish to use instead please send this to your account manager and we'll create that on the site for you.

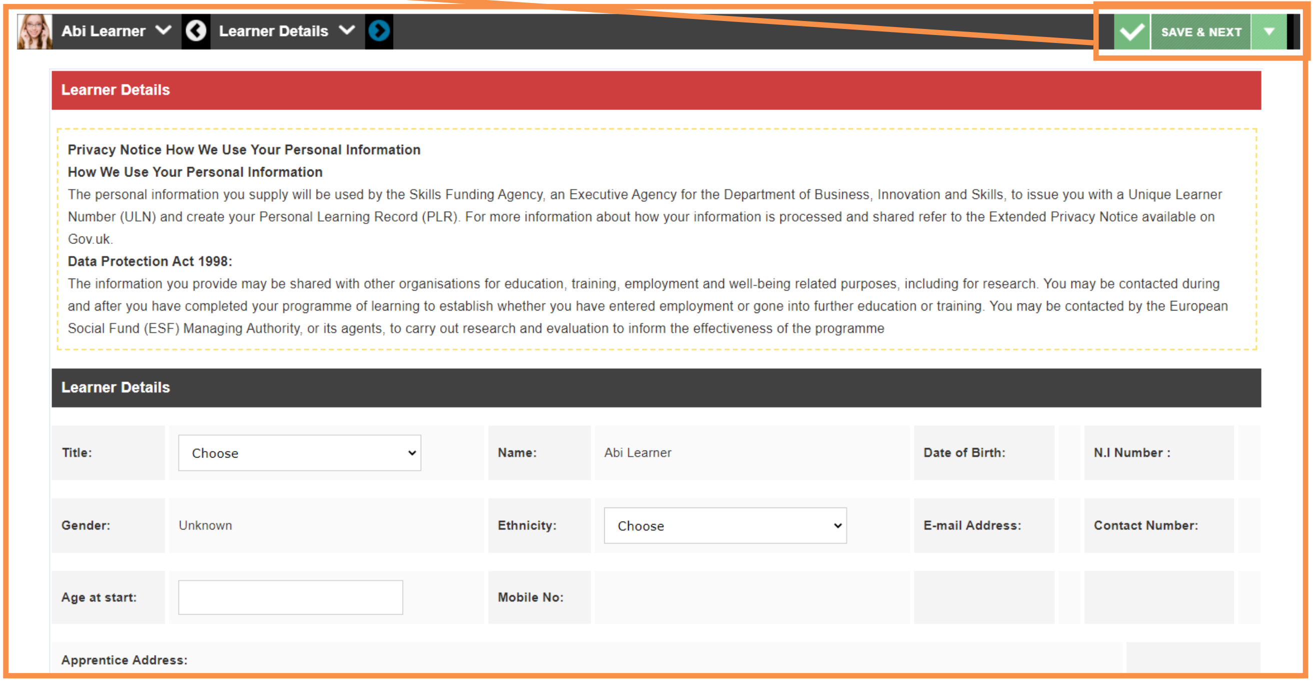
From your home page, select the **ILP tile.**



Here you will be able to see a list of all learners within your group, select the **Open ILP button** that relates to your chosen learner.



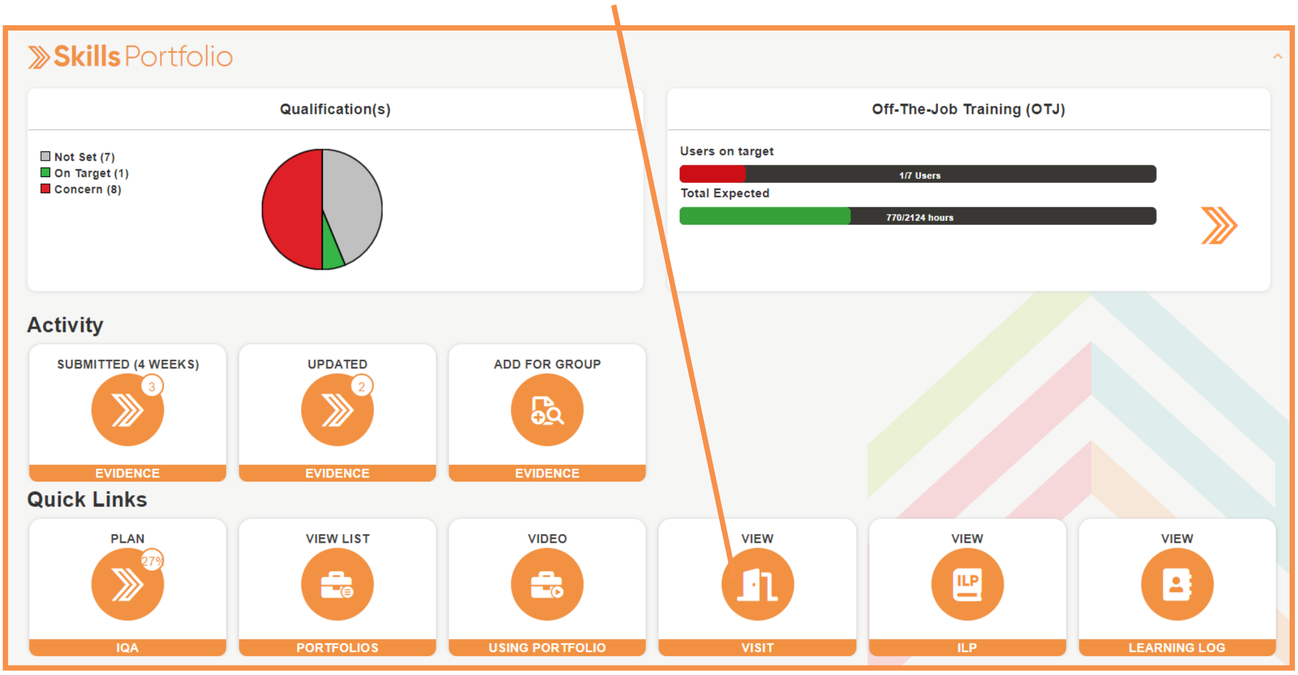
You will now be able to start completing your document electronically, and select the **Save** button after completing a page in order to save progress.



How to Record/Review a Visit

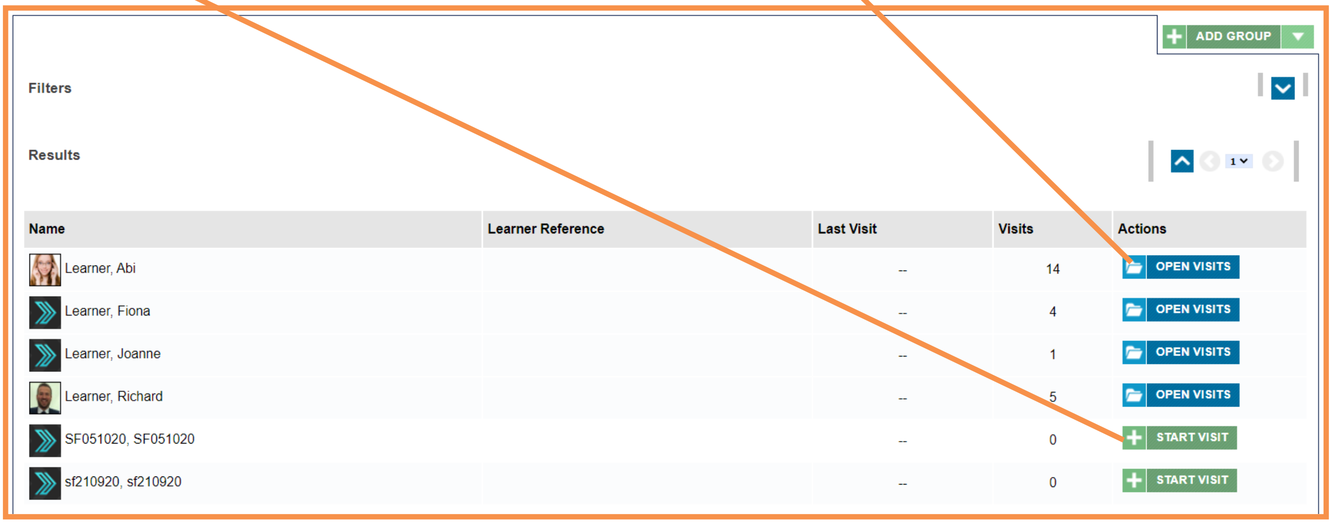
Skills forward allows you to document your learner's progress electronically via our default, editable visits. If you have a visit(s) or your own you wish to use instead please send them to your account manager and we'll create that on the site for you.

From your home page, select the **Visit tile.**



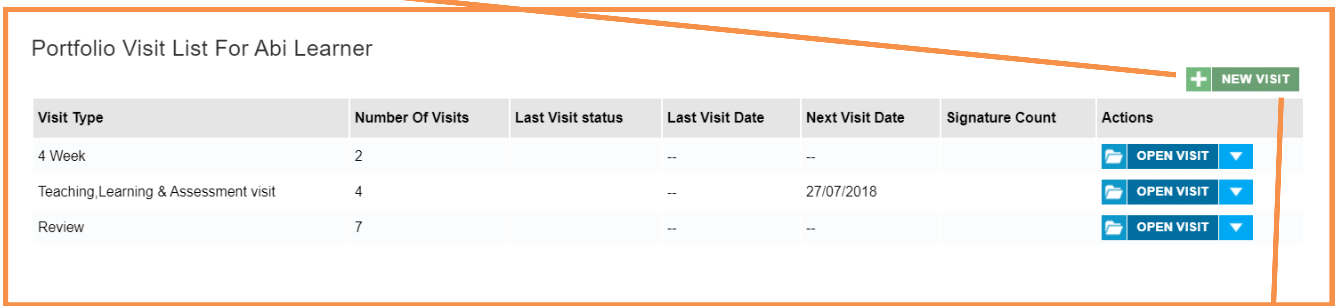
Here you will be able to see a list of all learners within your group, users with an open visits tile indicates they already have visits recorded whereas the users with start visit don’t have any recorded as of yet.

Depending on the type of user, select the **Open Visit** or the **Start Visit** button.



Name	Learner Reference	Last Visit	Visits	Actions
Learner, Abi		--	14	OPEN VISITS
Learner, Fiona		--	4	OPEN VISITS
Learner, Joanne		--	1	OPEN VISITS
Learner, Richard		--	5	OPEN VISITS
SF051020, SF051020		--	0	START VISIT
sf210920, sf210920		--	0	START VISIT

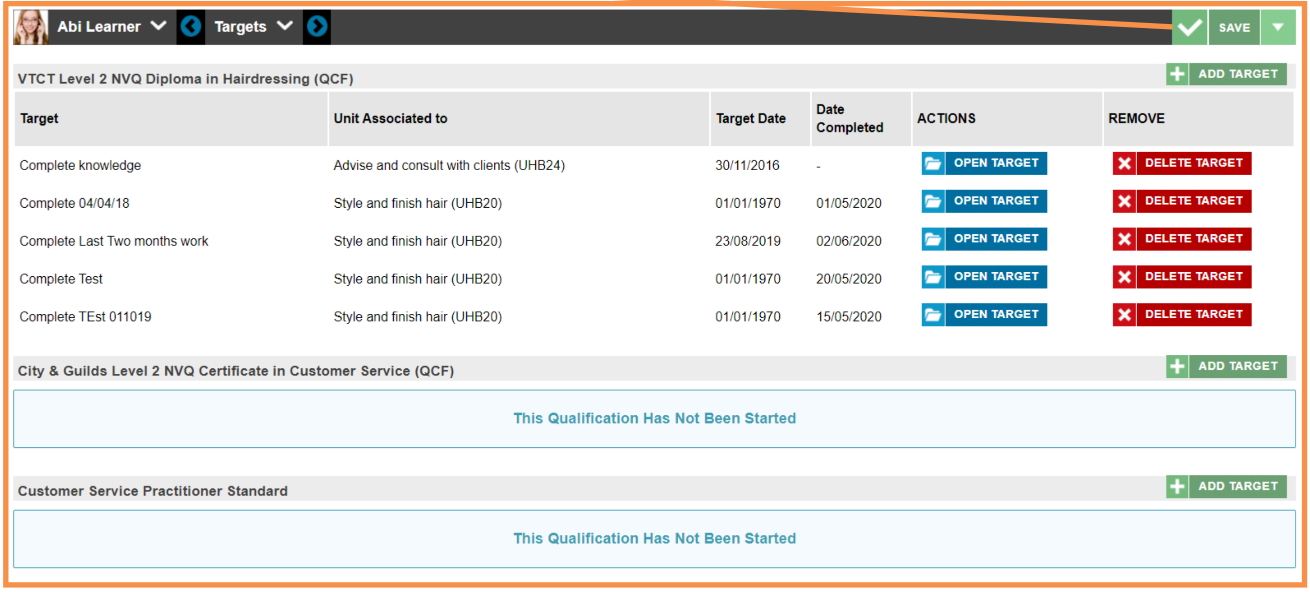
You will now be able to select the start visit tile that relates to the visit type you are aiming to document, for the **open visit users** you will need to select the green **New Visit** button before selecting the Visit type.



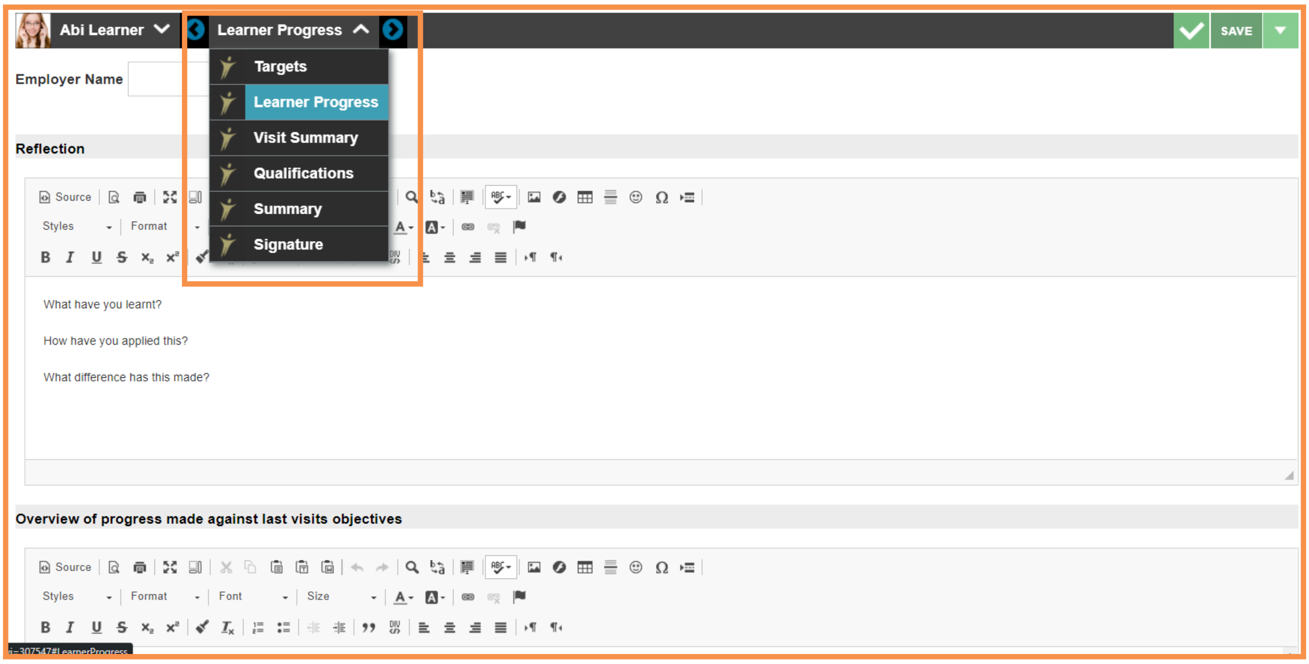
Visit Type	Number Of Visits	Last Visit status	Last Visit Date	Next Visit Date	Signature Count	Actions
4 Week	2		--	--		OPEN VISIT
Teaching,Learning & Assessment visit	4		--	27/07/2018		OPEN VISIT
Review	7		--	--		OPEN VISIT

Visit Type	Number Of Visits	Min Days	Max Days	Actions
Review	7	0	31	START VISIT
Teaching,Learning & Assessment visit	4			START VISIT
4 Week	2			START VISIT

You will now be able to start completing your document electronically, select the **Save button** after completing a page in order to save progress.

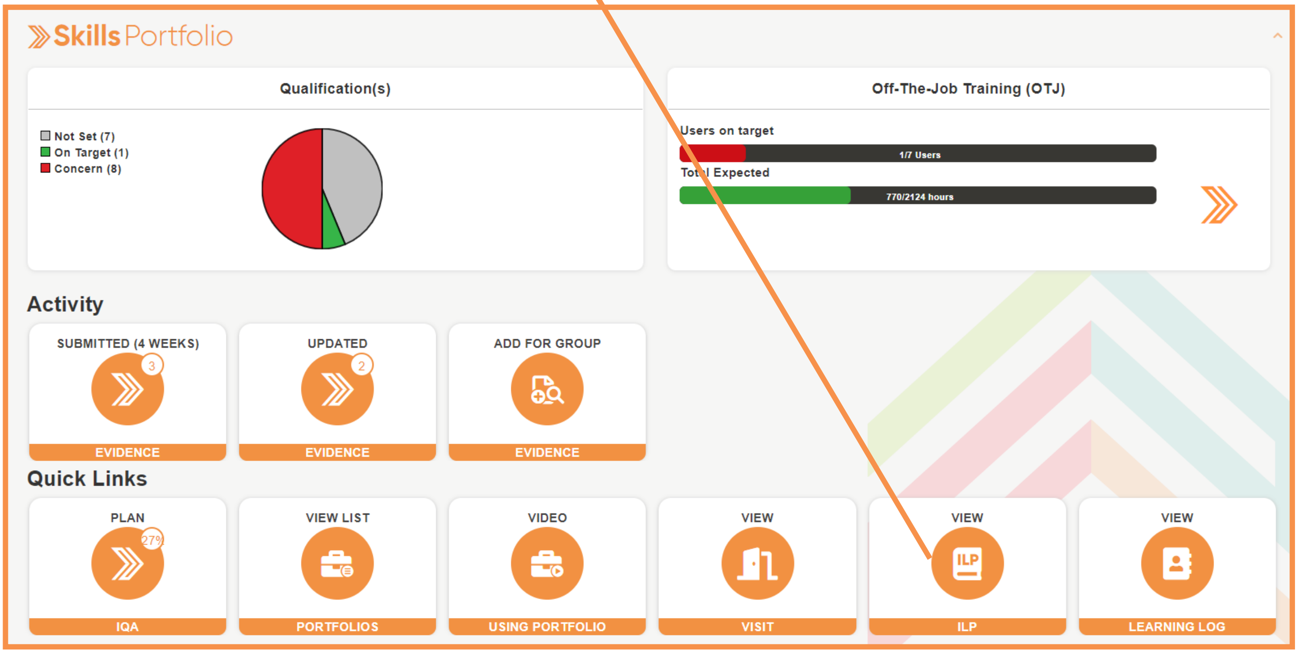


Use the **dropdown button** to change the page of this doc, ensuring you are completing every field and selecting **save** throughout.



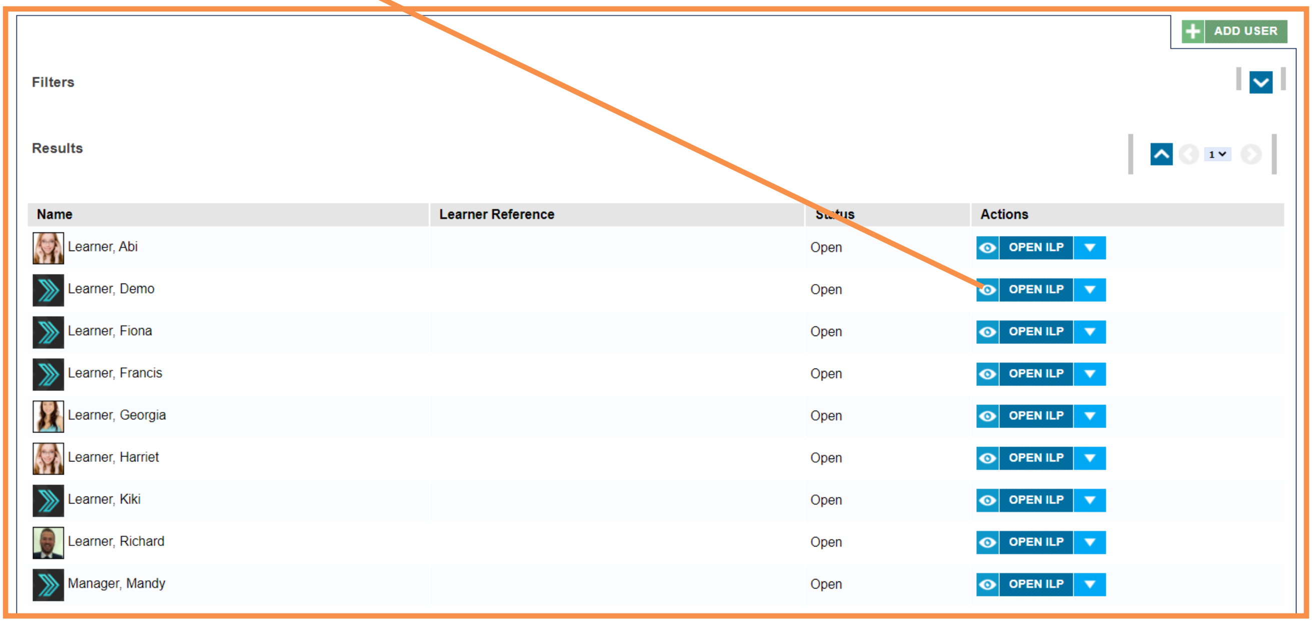
How to View Visits

From your home page, select the **ILP tile.**

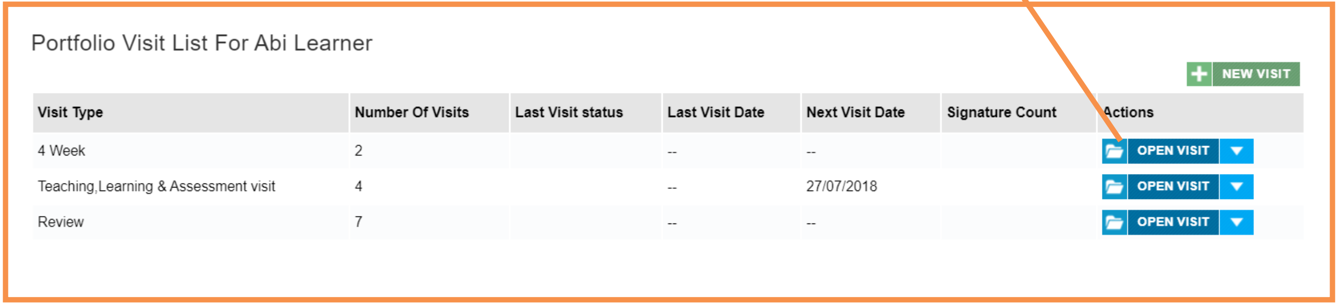


Here you will be able to see a list of all learners within your group, users with an open visits button indicates they already have visits recorded whereas the users with start visit don't have any recorded as of yet.

Select the **Open Visits** button that relates to your chosen learner.



The recorded visits are categorised by type, select the **Open Visit** button that relates to your chosen visit type.

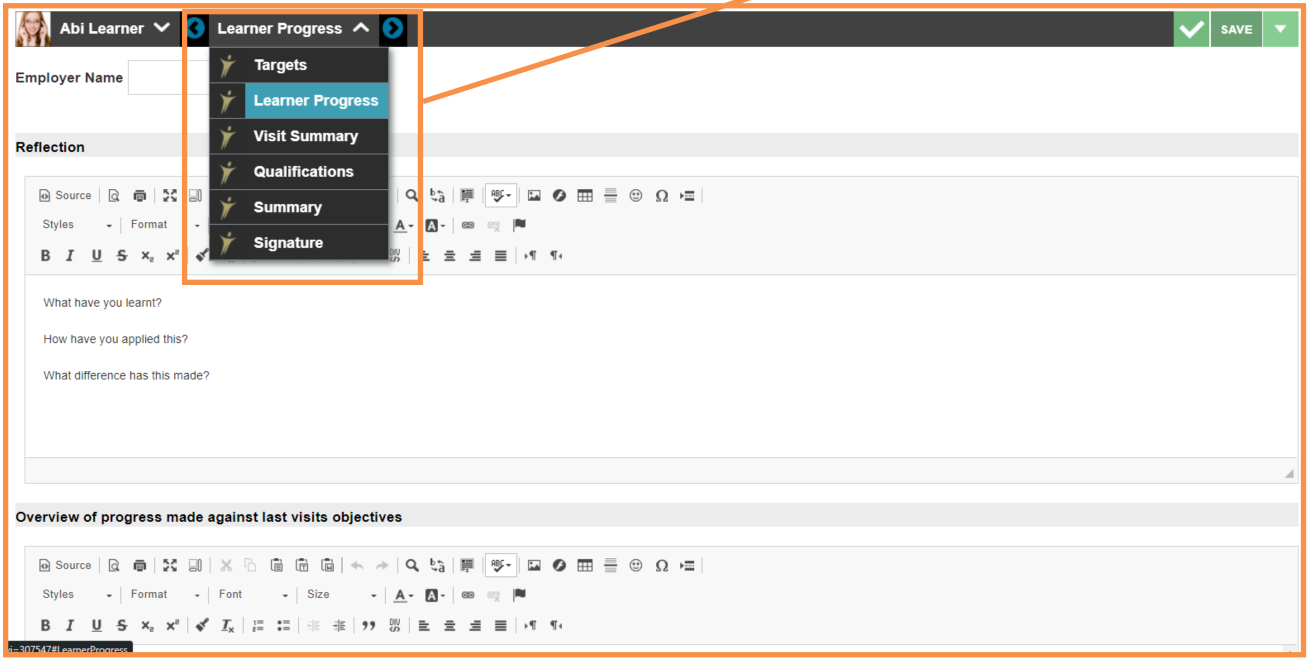


Portfolio Visit List For Abi Learner

NEW VISIT

Visit Type	Number Of Visits	Last Visit status	Last Visit Date	Next Visit Date	Signature Count	Actions
4 Week	2		--	--		OPEN VISIT
Teaching,Learning & Assessment visit	4		--	27/07/2018		OPEN VISIT
Review	7		--	--		OPEN VISIT

You will now be able to see the recorded visit, use the **dropdown menu** to change the page of this doc.



How to Build an Assessment Plan

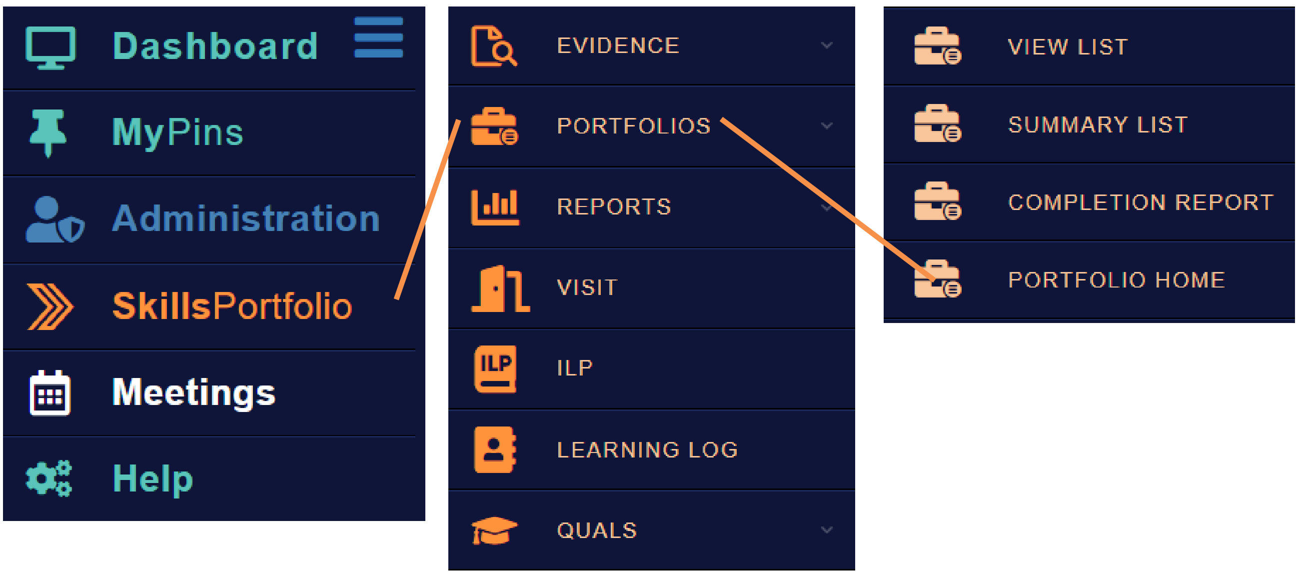
What is an assessment plan?

An assessment plan is for portfolio users only. An assessment plan is a series of tasks/instructions hosted on templates that can be assigned to learner's profiles. These tasks/instructions are evidence that are directly linked to criteria present in a qualification they are assigned too. Once the task has been completed it will mark off progression in relation to their qualification.

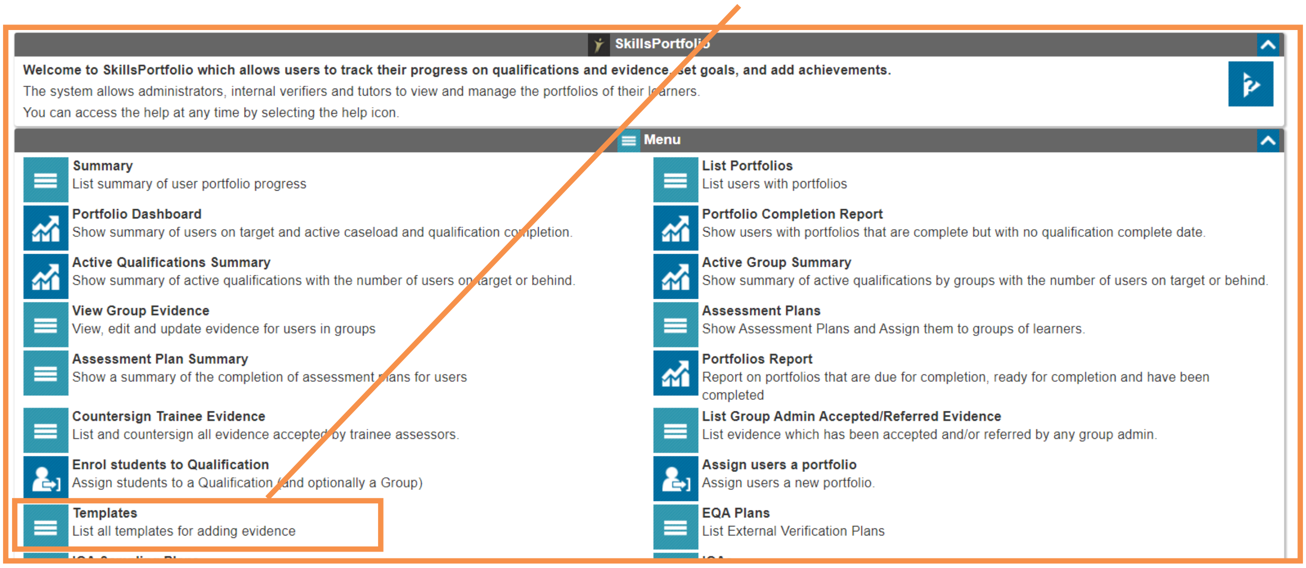
You must be an **administrator** to create an assessment plan; customers have the rights to do so.

In order to create an assessment plan first you must create templates that hold the relevant instruction, and are linked to the units and criteria as required. They are then added to the assessment plan and sequenced as desired.

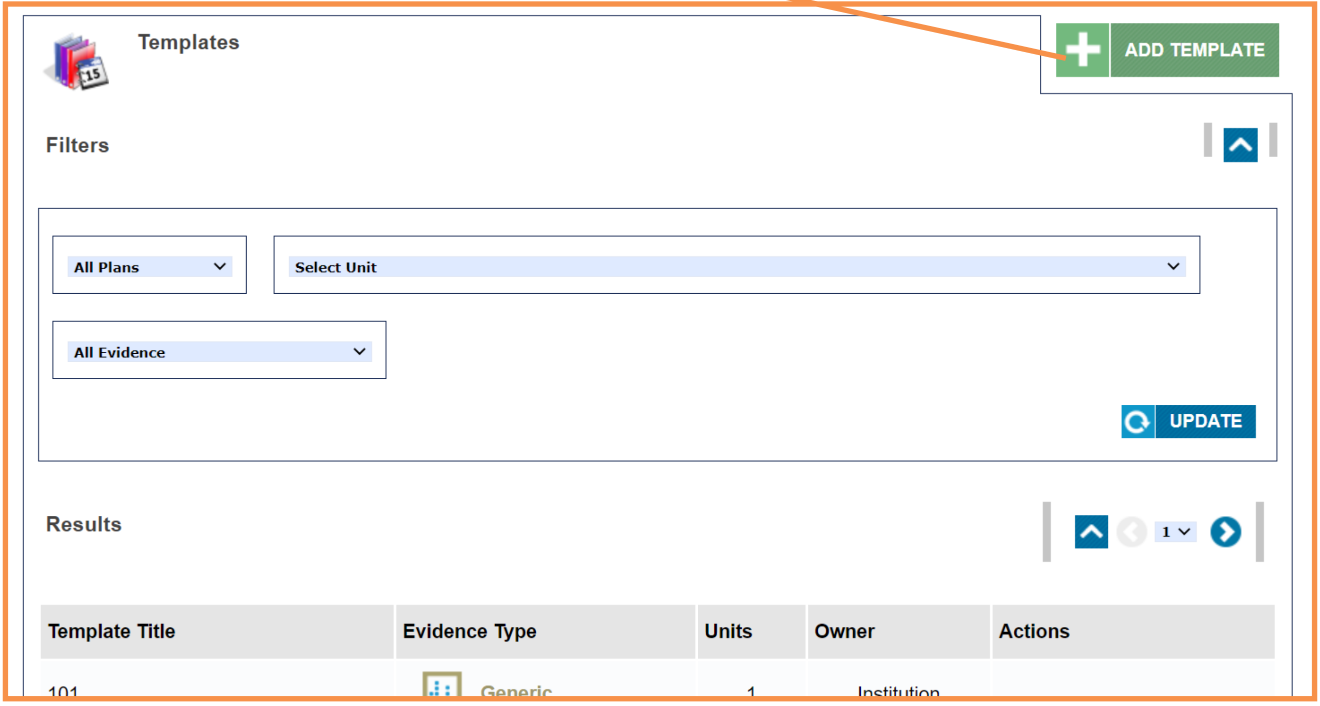
From the home page, select the portfolio button that appears on the side tool bar. Select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



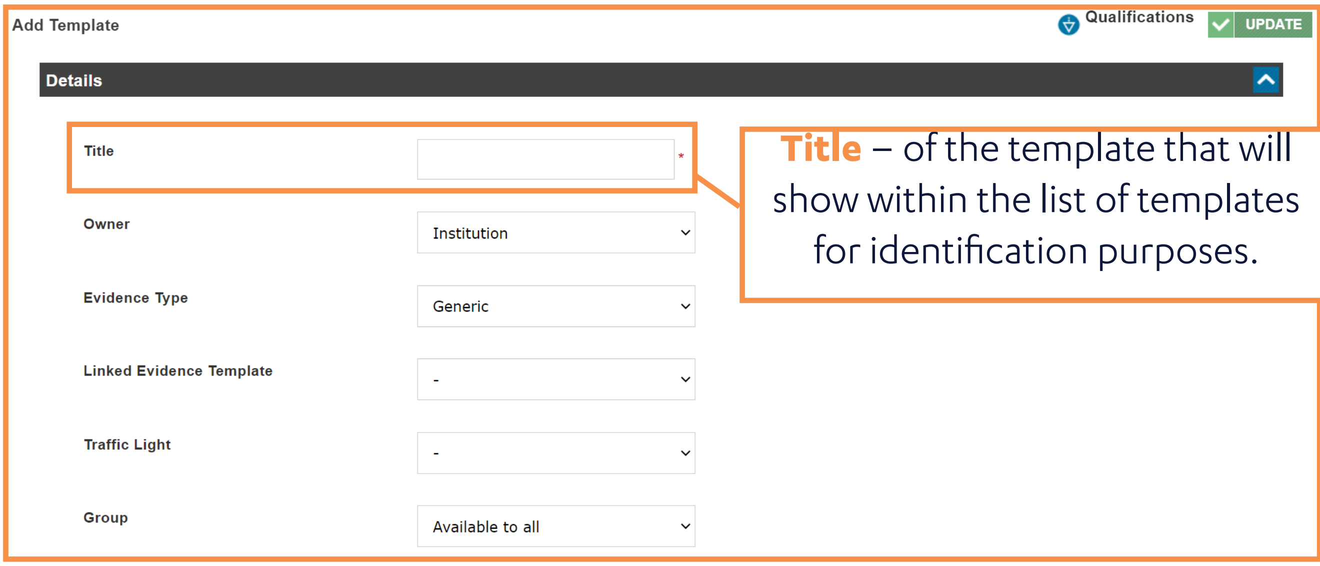
From portfolio home select the button ‘**Templates**’.



Begin by selecting the green **ADD TEMPLATE** button present on this page.

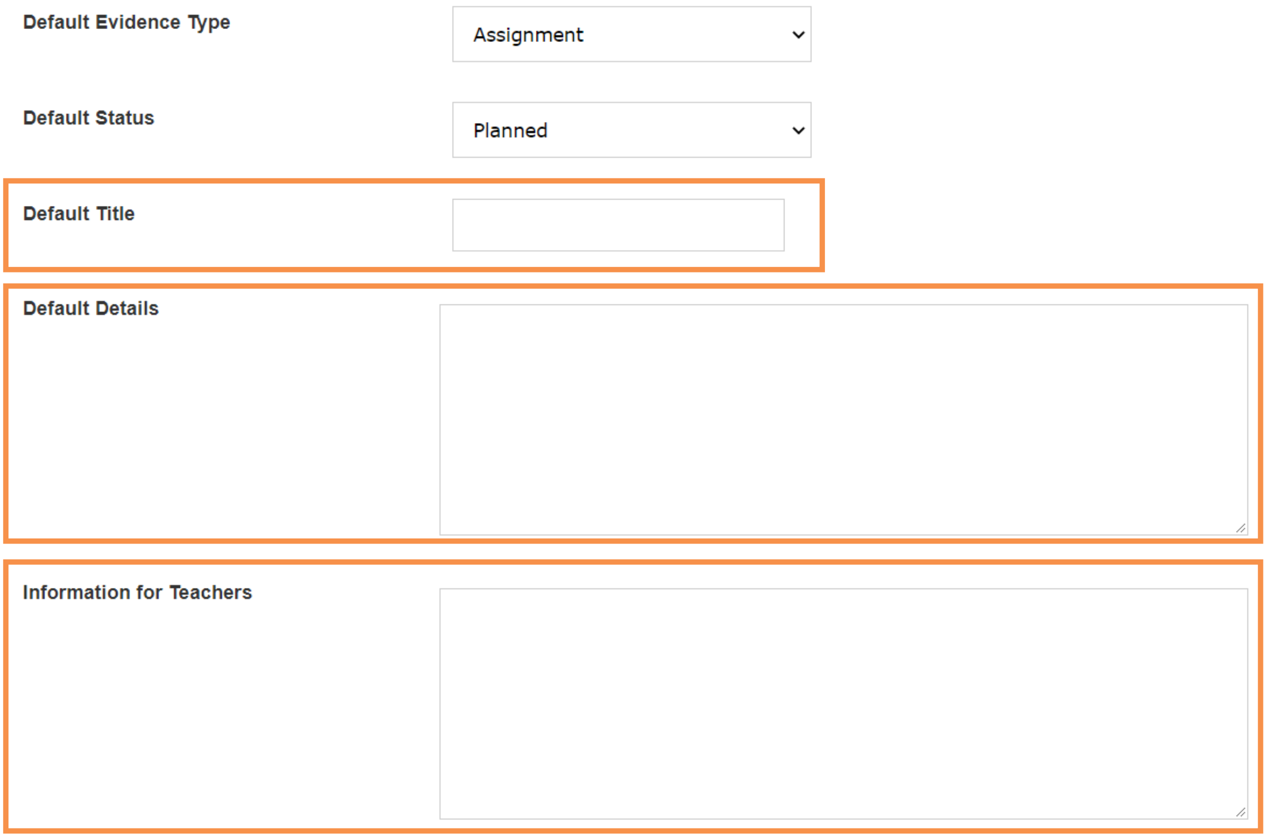


Please begin to populate the fields on this template using the following guidance.



Title – of the template that will show within the list of templates for identification purposes.

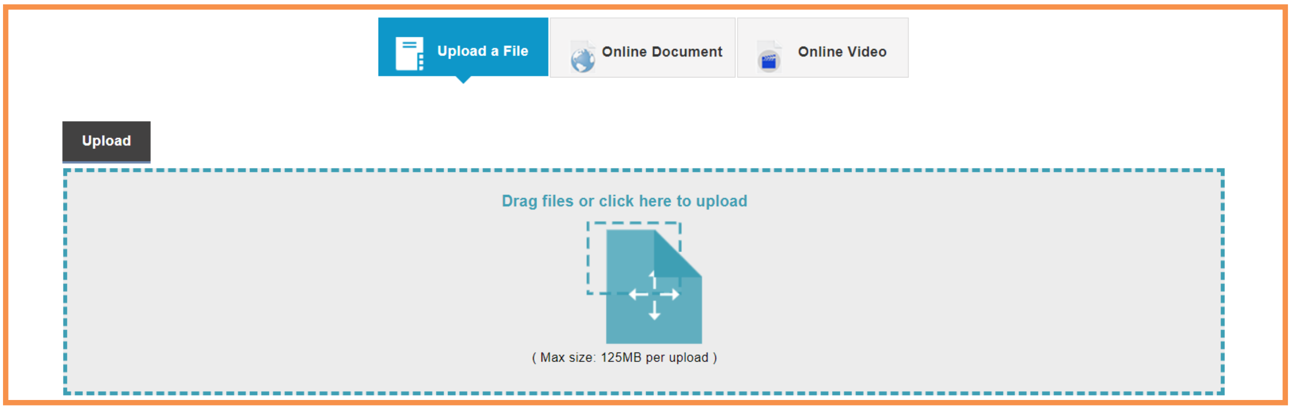
Default title – this shows within the portfolio when viewing the template.



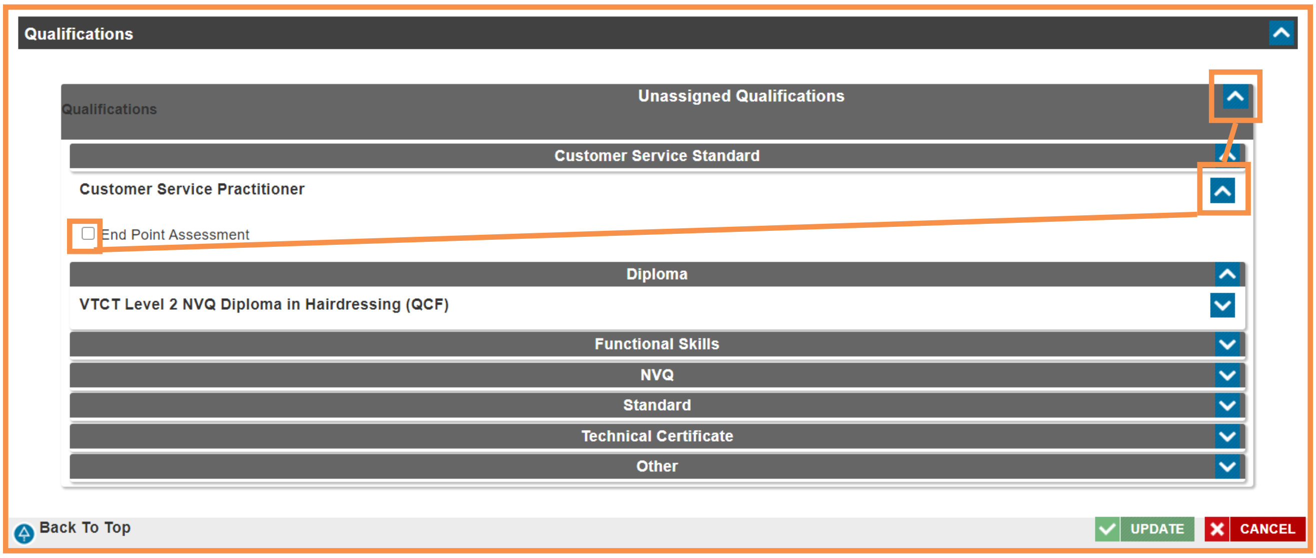
Default details – this is where you will specify the task itself e.g.: 'record yourself dealing with a phone call and attach the recording to evidence'.

Information for Tutors – this is where you will specify any data the tutor making this needs to be aware of e.g.: don't accept evidence if the text isn't in red'.

Drag files or click here to upload - Drag files or select here to upload - use where applicable to add files.



Select at the very minimum the applicable units using the blue drop down in relation to the qualification icon located at the bottom of page. Here you will be able to tick the box of the relevant unit and select **update**.
You will map it to the criteria once you have selected update in the same fashion as before.

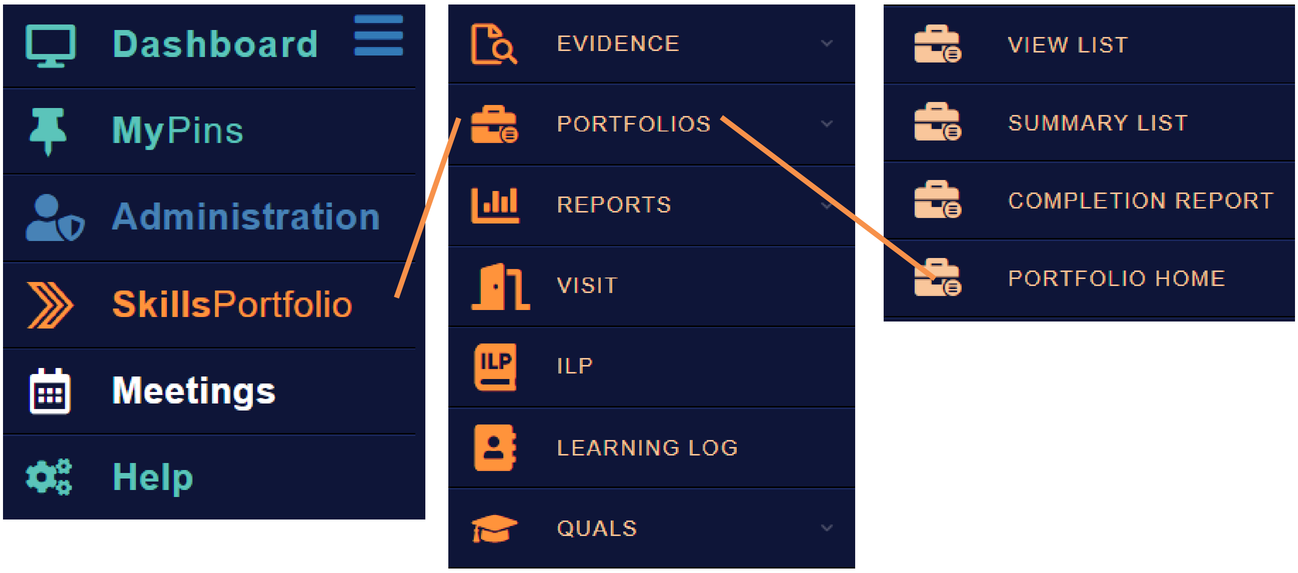


All other fields are not mandatory.

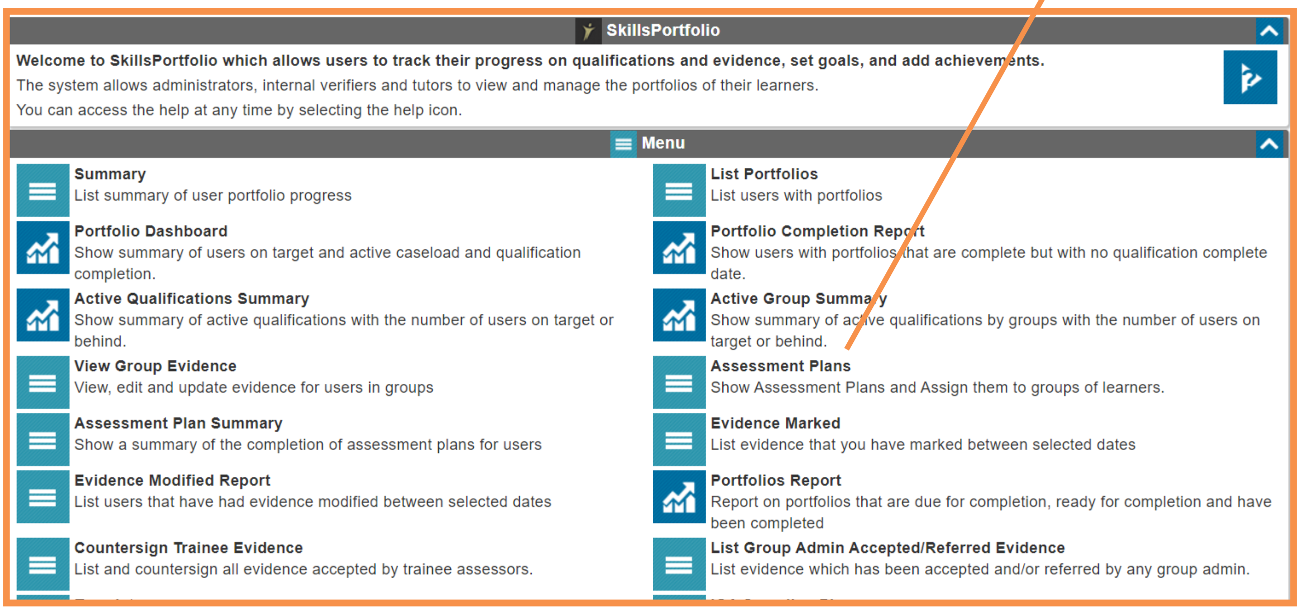
Repeat this process for each template as required until you have mapped relevant parts of the qualification.

Linking Templates to Assessment Plans

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From portfolio home you will be able to click the icon **'Assessment Plans'.**



From this page you can see any existing Assessment Plans, if you wish to add a new one then select the green **ASSESSMENT PLAN** button.

Assessment Plans

+ ASSESSMENT PLAN

1

Title	Friendly Title	Reference	Templates	Valid From	Valid To	Actions
Automotive LV	Automotive LV	--	3	--	--	EDIT PLAN
Azesta	Azesta	--	3	--	--	EDIT PLAN
Customer Service	Customer Service	--	9	--	--	EDIT PLAN
H&S	H&S	--	1	--	--	EDIT PLAN
Need	Need	--	2	01/07/2018	16/06/2019	EDIT PLAN
Prem Dem	Prem Dem	--	4	--	--	EDIT PLAN
SeaRegs	SeaRegs	--	2	03/09/2018	31/08/2020	EDIT PLAN
testing	testing	--	0	--	--	EDIT PLAN
Total Training	Total Training	--	1	--	--	EDIT PLAN

Please begin to populate the fields on this template using the following guidance.

Title	
Friendly Title	
Plan reference	
Valid From	
Valid To	
Add Template	Select
Add Linked Assessment Plan	Select

Title - relevant to the qualification/plan you're creating.

Friendly title – shows within the portfolio.

Plan reference - to add your internal reference to the plan where applicable for ease of identification

Add template – select the template you wish to add from the existing templates you've already created then select update.

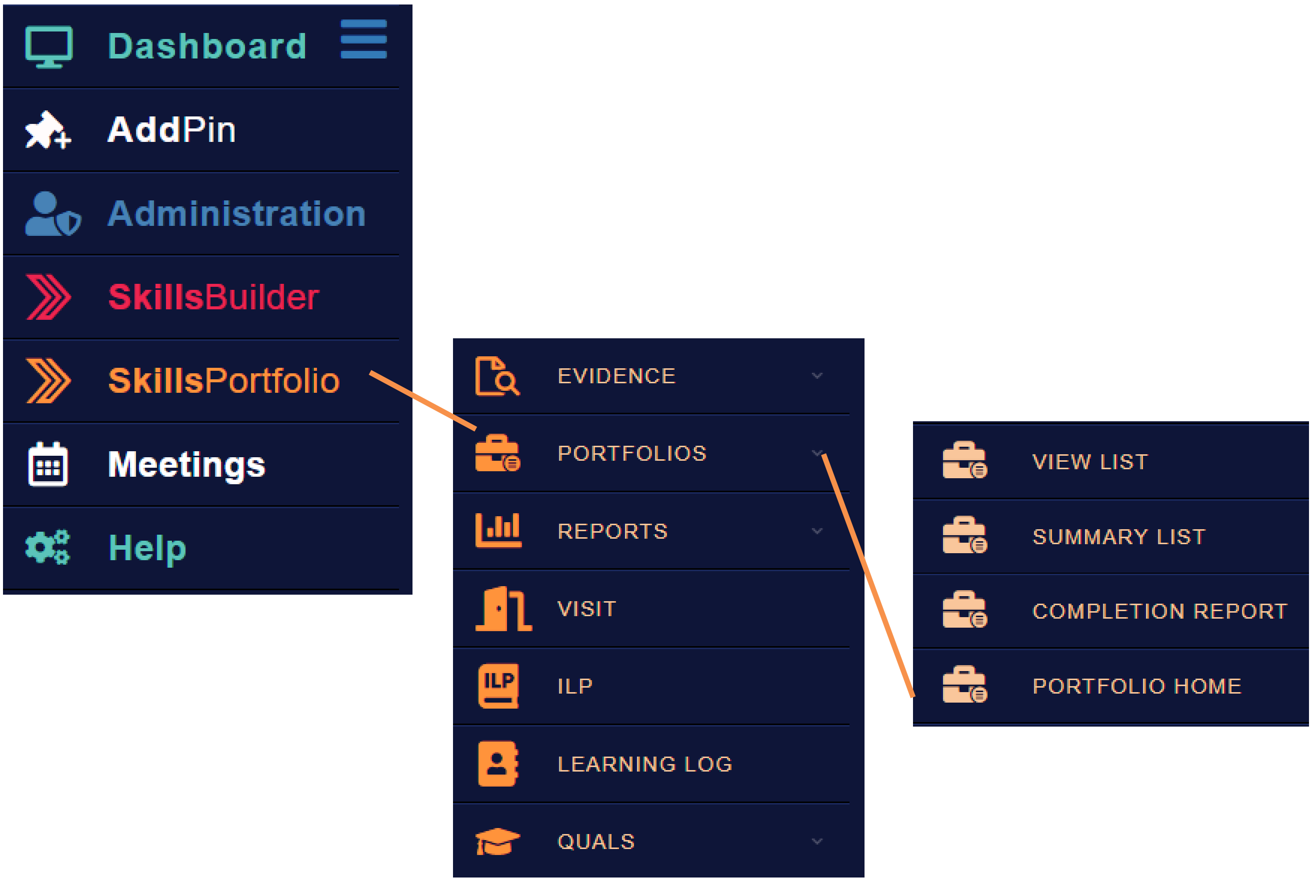
Repeat the previous step until all templates are present in the plan in the order you would expect. Edit the sequence as desired

Select **update** to finish the build of the assessment plan.

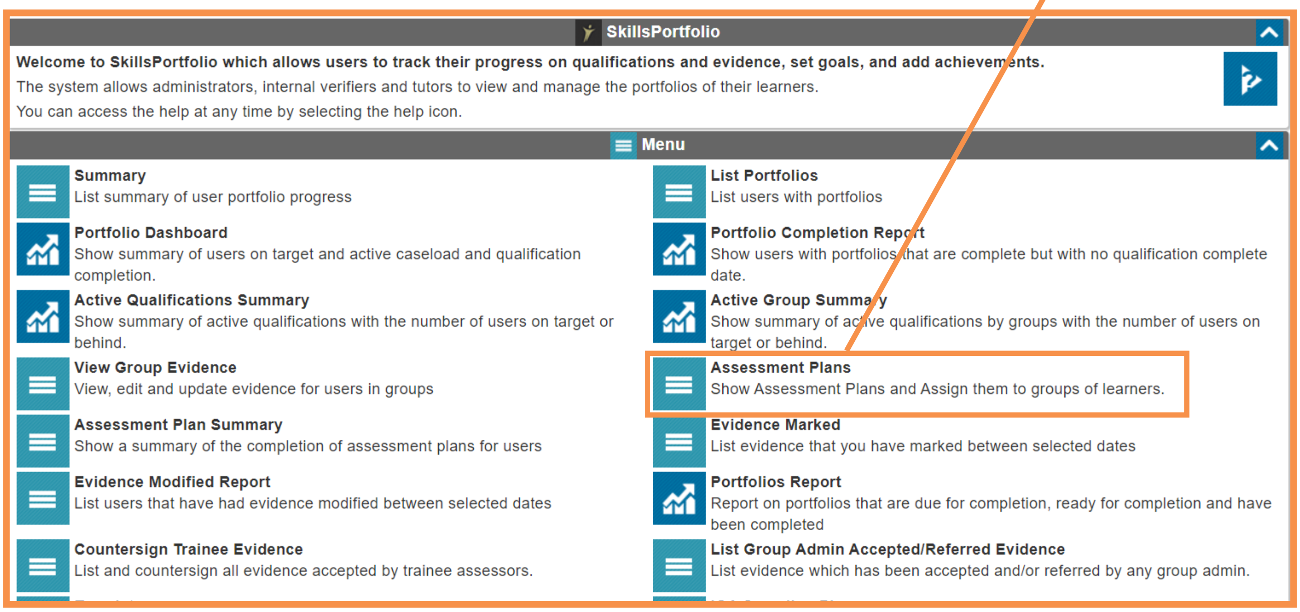
UPDATE

Assign an Assessment Plan

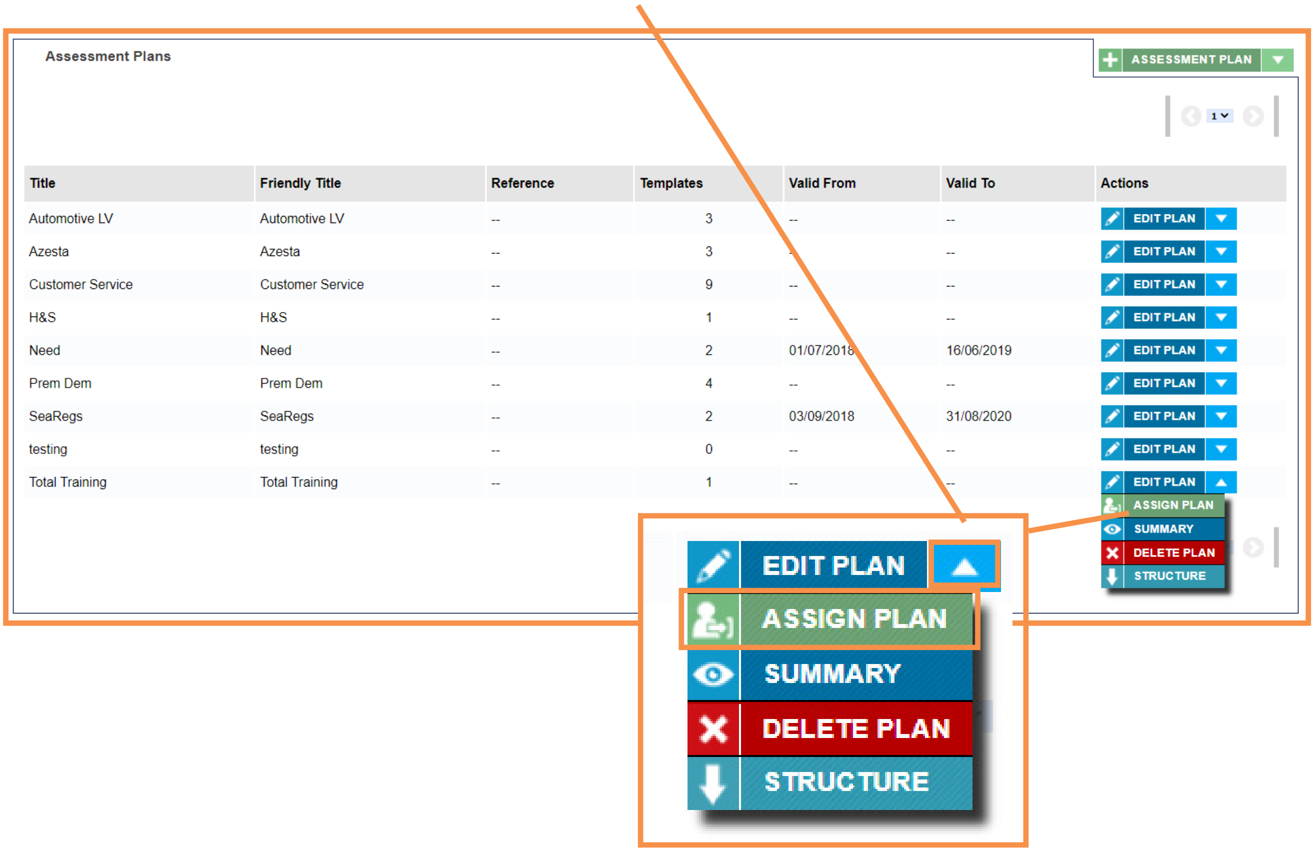
From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From portfolio home you will be able to click the icon **'Assessment Plans'.**



Here will be a list of all assessment plans you have created. Select the **dropdown** next appropriate plan and select **Assign Plan.**

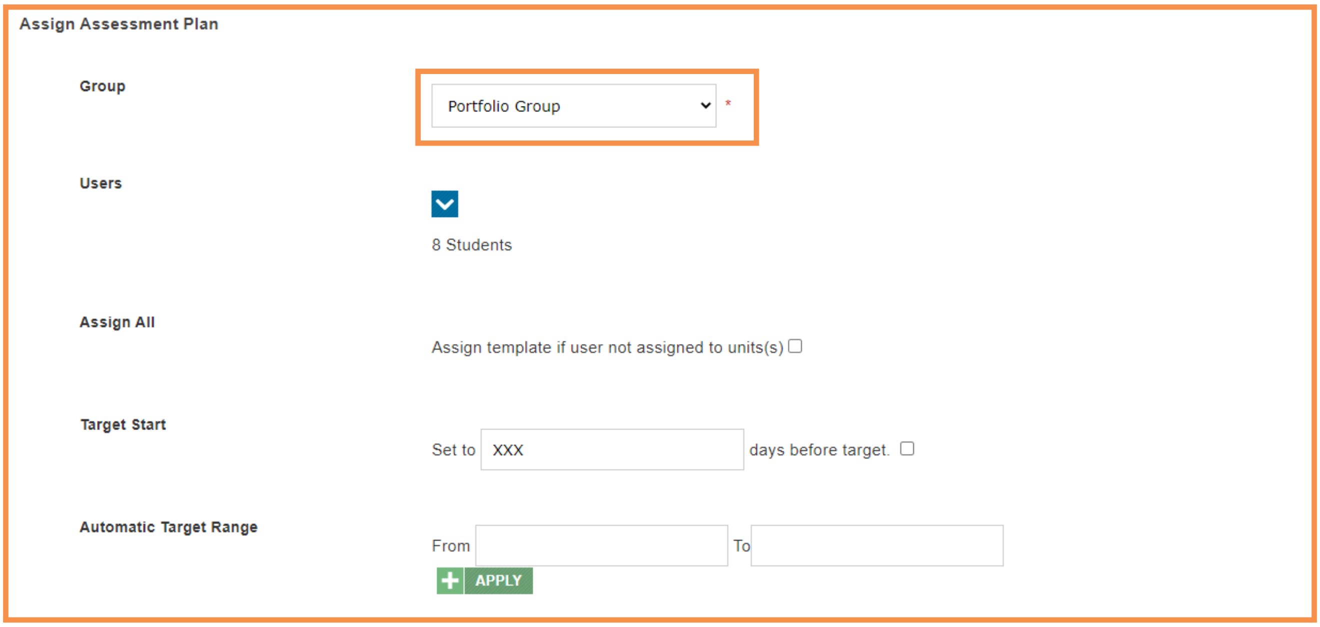


Assessment Plans

ASSESSMENT PLAN

Title	Friendly Title	Reference	Templates	Valid From	Valid To	Actions
Automotive LV	Automotive LV	--	3	--	--	EDIT PLAN
Azesta	Azesta	--	3	--	--	EDIT PLAN
Customer Service	Customer Service	--	9	--	--	EDIT PLAN
H&S	H&S	--	1	--	--	EDIT PLAN
Need	Need	--	2	01/07/2018	16/06/2019	EDIT PLAN
Prem Dem	Prem Dem	--	4	--	--	EDIT PLAN
SeaRegs	SeaRegs	--	2	03/09/2018	31/08/2020	EDIT PLAN
testing	testing	--	0	--	--	EDIT PLAN
Total Training	Total Training	--	1	--	--	EDIT PLAN

Here you will be able to **select a group of users** to assign the plan too.



Select **update** to finalise the assign of an assessment plan.

Be aware of the fact, adding new users to the group will not assign them to the plan you will need to repeat these steps.

IQA Sampling Plan

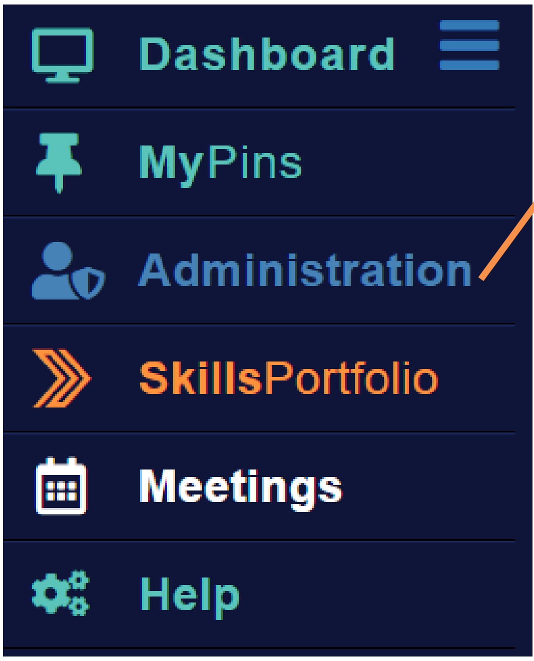
What is an IQA Sampling plan?

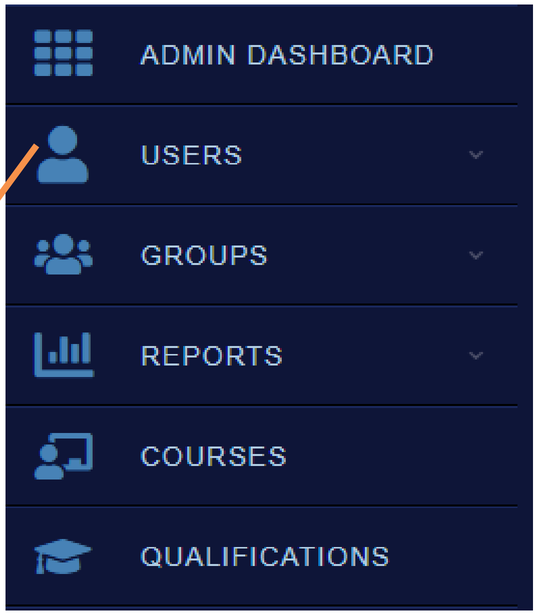
This feature allows evidence that has been accepted by assessors/tutors to be verified or IQA referred by an internal verifier.

Assign User IQA Role/Permissions

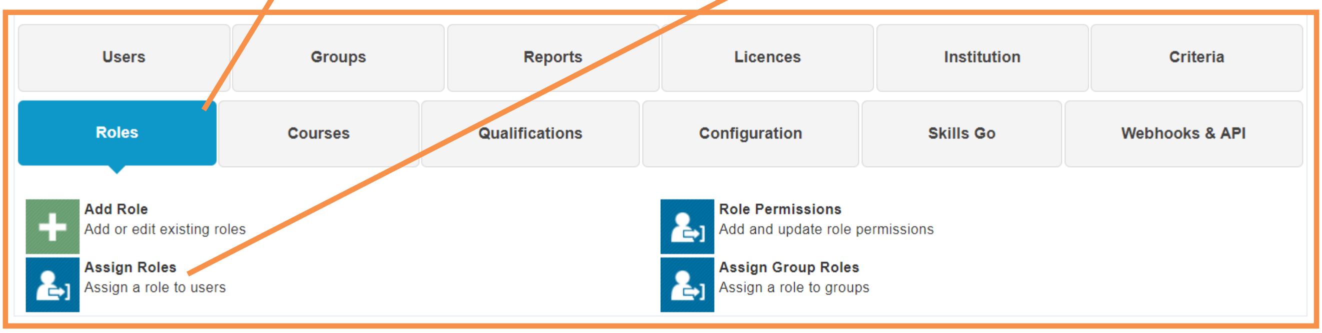
From home page select the **Administration** tab in the tool bar located on the left hand side of the page

Select **Admin Dashboard**

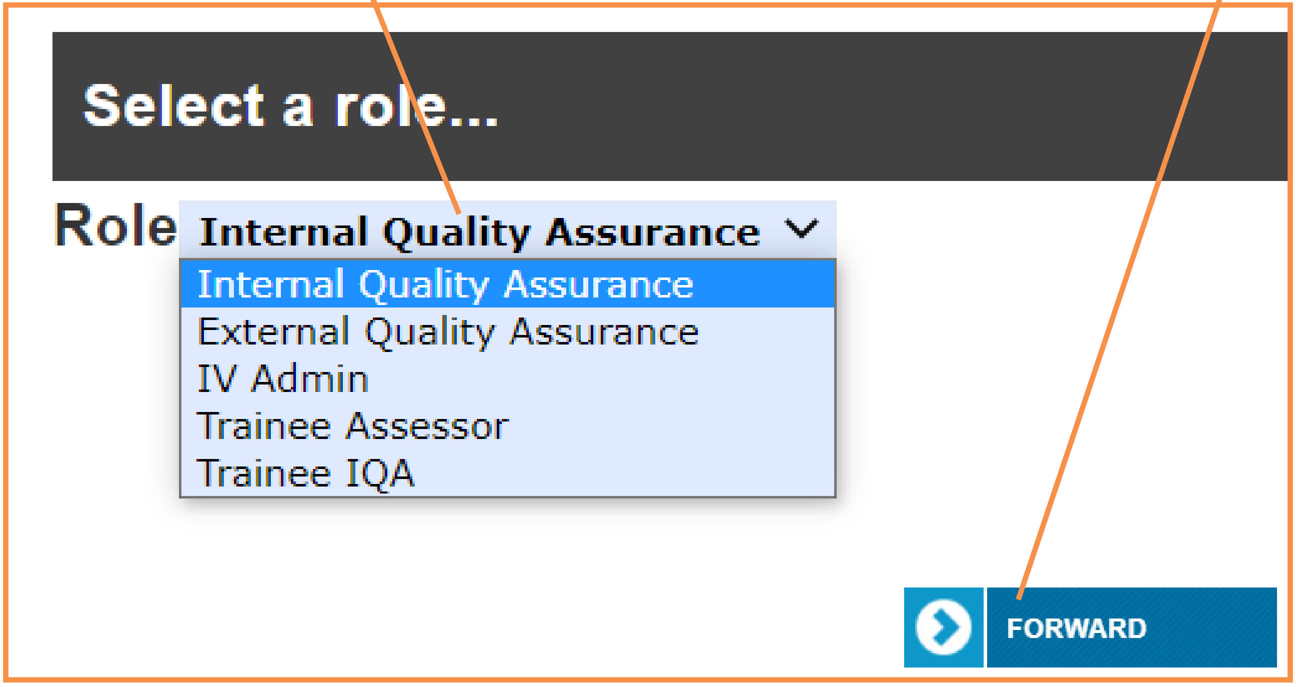




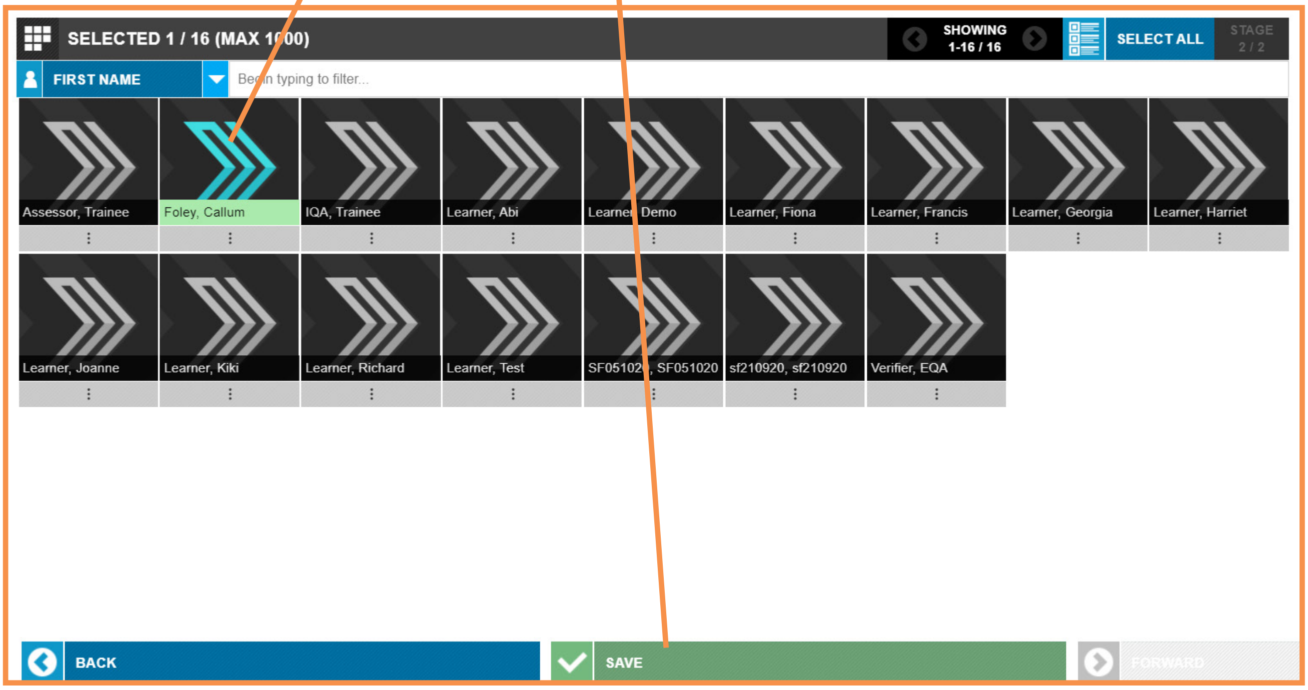
Select the **Roles section** > Select the **Assign Roles icon**



Select **Internal Quality Assurance** from the dropdown list, then select **Forward**

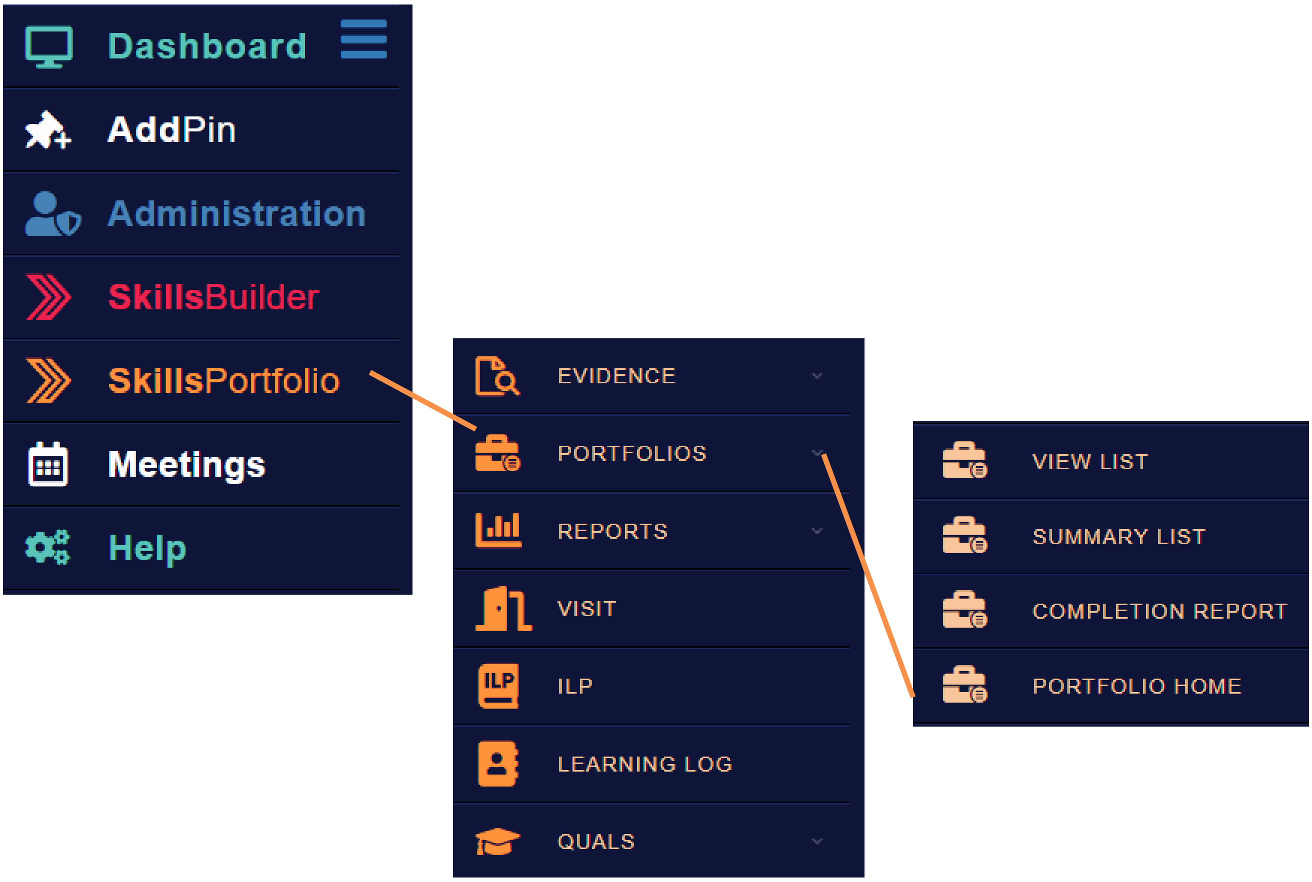


Select your **chosen user** and select **save**.

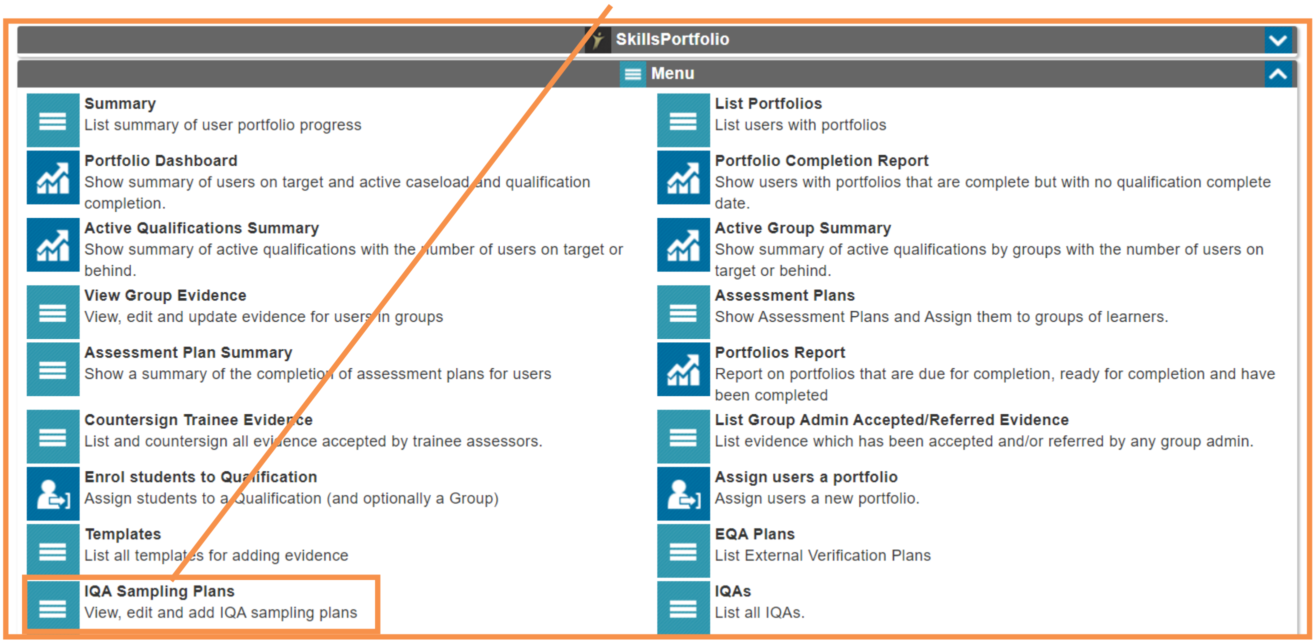


Create an IQA Plan

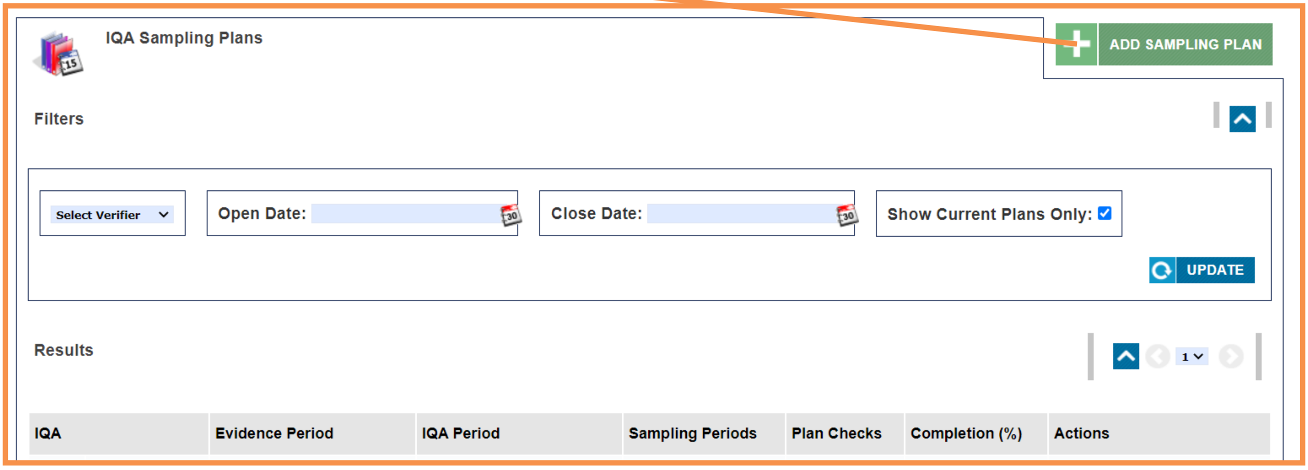
From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From this page select the **IQA sampling plans** option



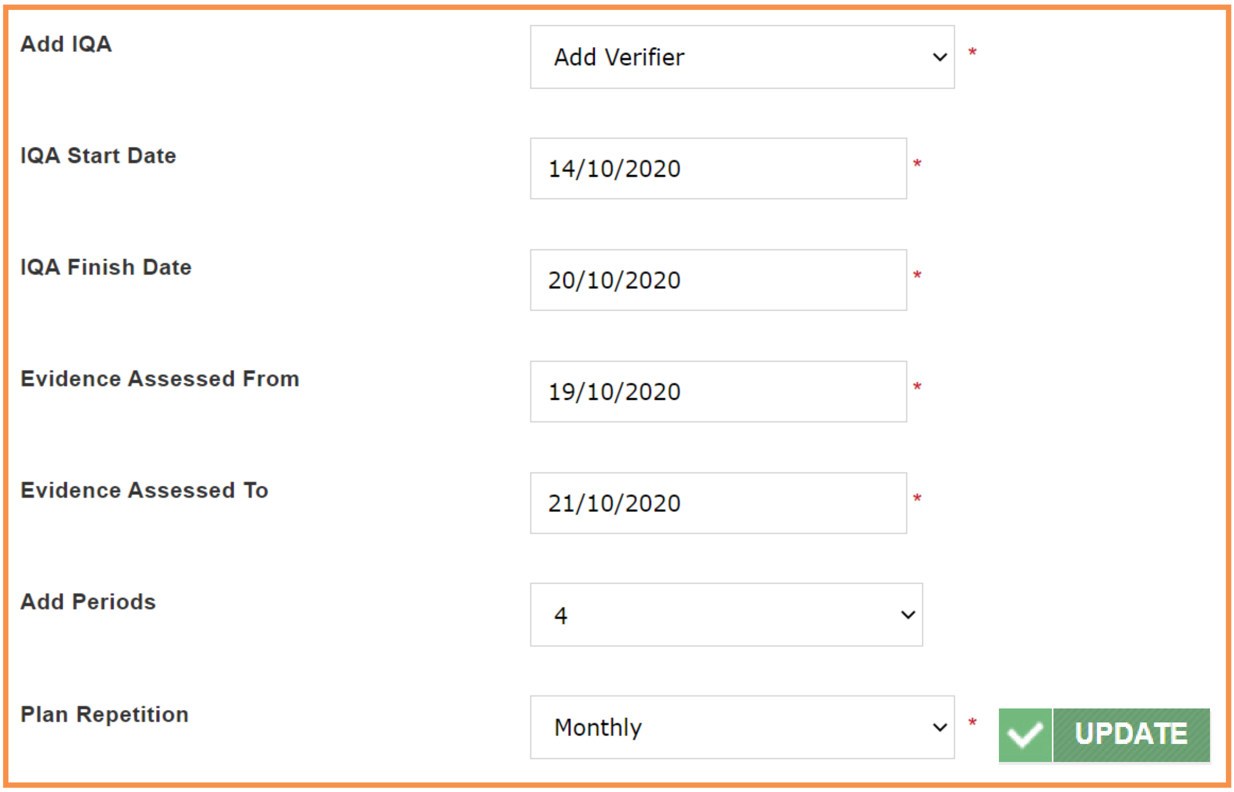
Select **Add Sampling plan**



Add the IQA to this plan by selecting their profile from the **drop down**. If their profile isn't present in the drop down they have not been assigned the role of IQA.

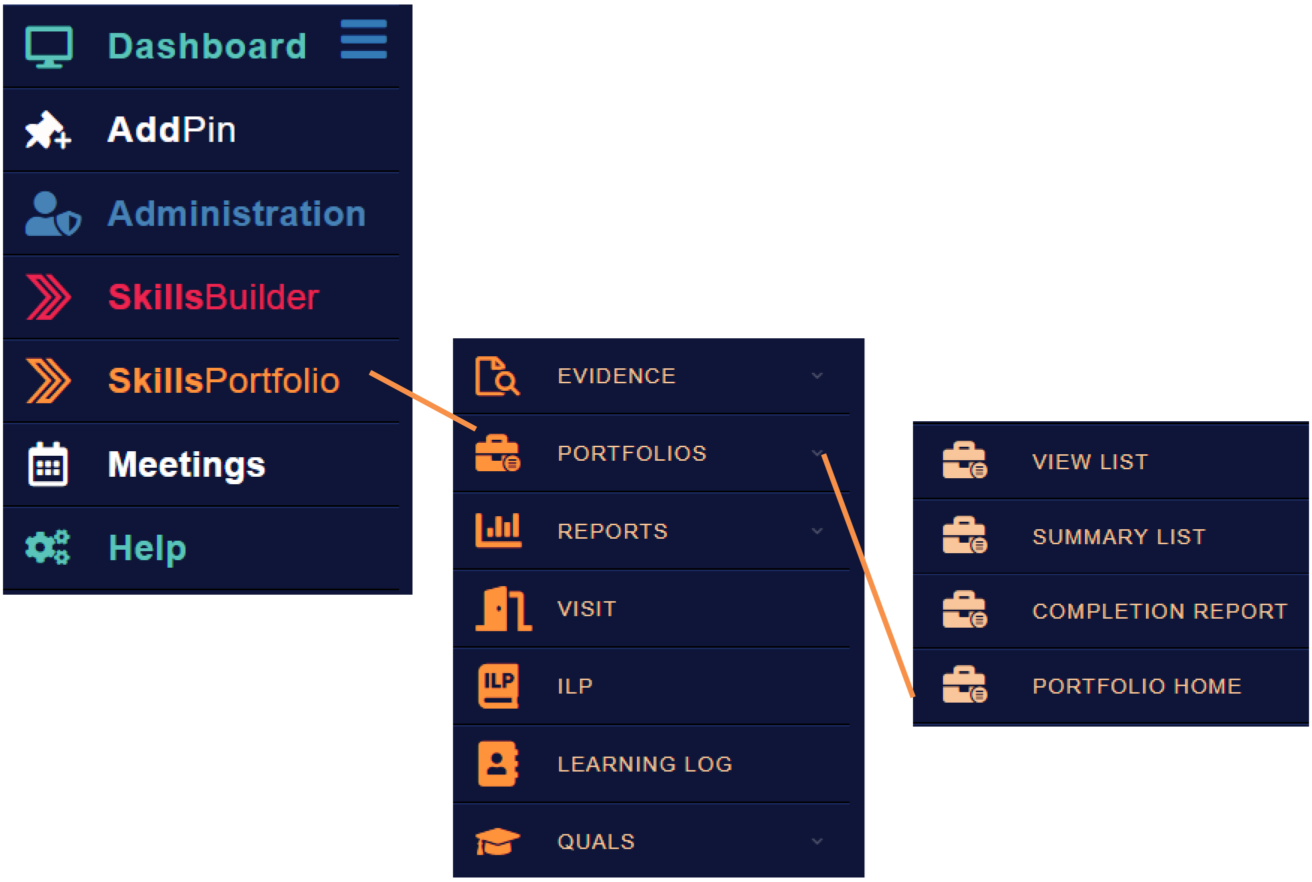
- **Specify the start and end date** the IQA plan will be available for
- **Specify the evidence assessed** to and evidence assessed from.
- **You may select a period** if you wish. The plan will be broken down into the number of periods selected, allowing you to view what evidence was IQA'd in which period.
- **Select a plan repetition** if required. This can be used instead of a longer plan with multiple periods.

Select **update** in order to finalise the creation of the plan. Be aware this is not the final step in the process you must now configure the plan.

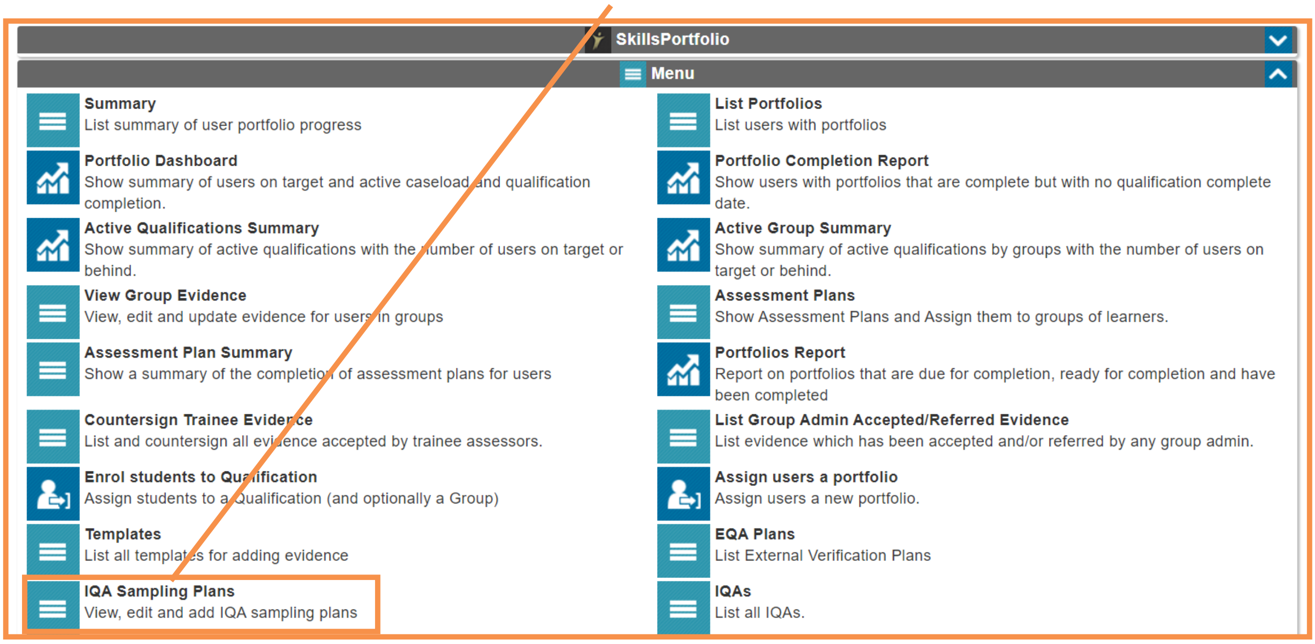


Configure an IQA Sampling plan

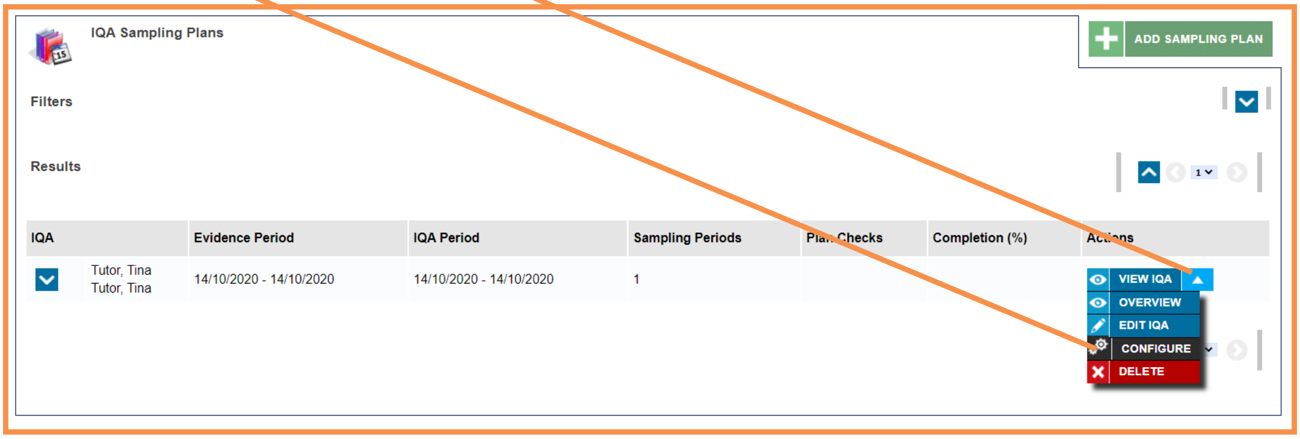
From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From this page select the **IQA sampling plans** option

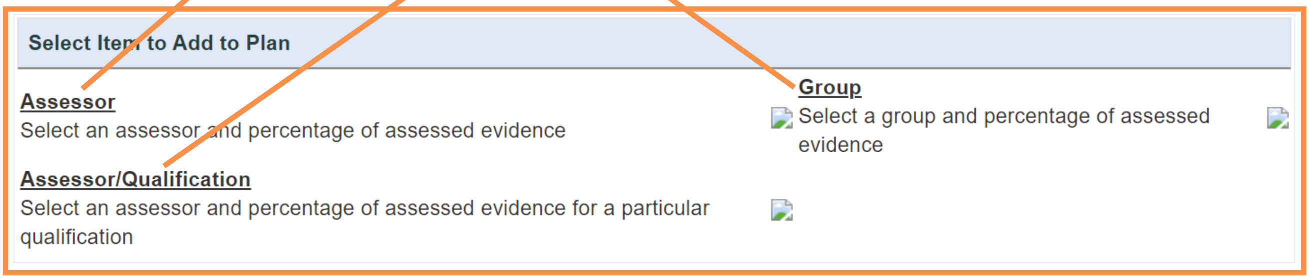


Here you will be able to see all open IQA plans. Select the **drop down** that relates to the '**View IQA**' button you are to configure.
Select **Configure.**

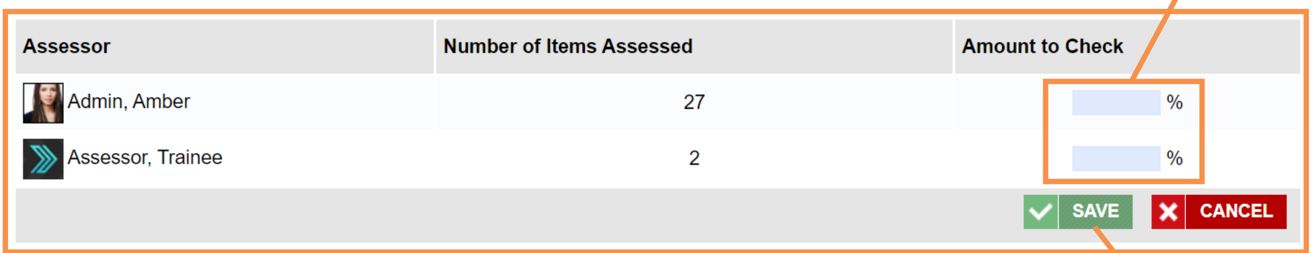


On this page select the '**Add items to plan**' button.

Depending on the nature of the plan, select an **assessor**/**qualification** or **group**.



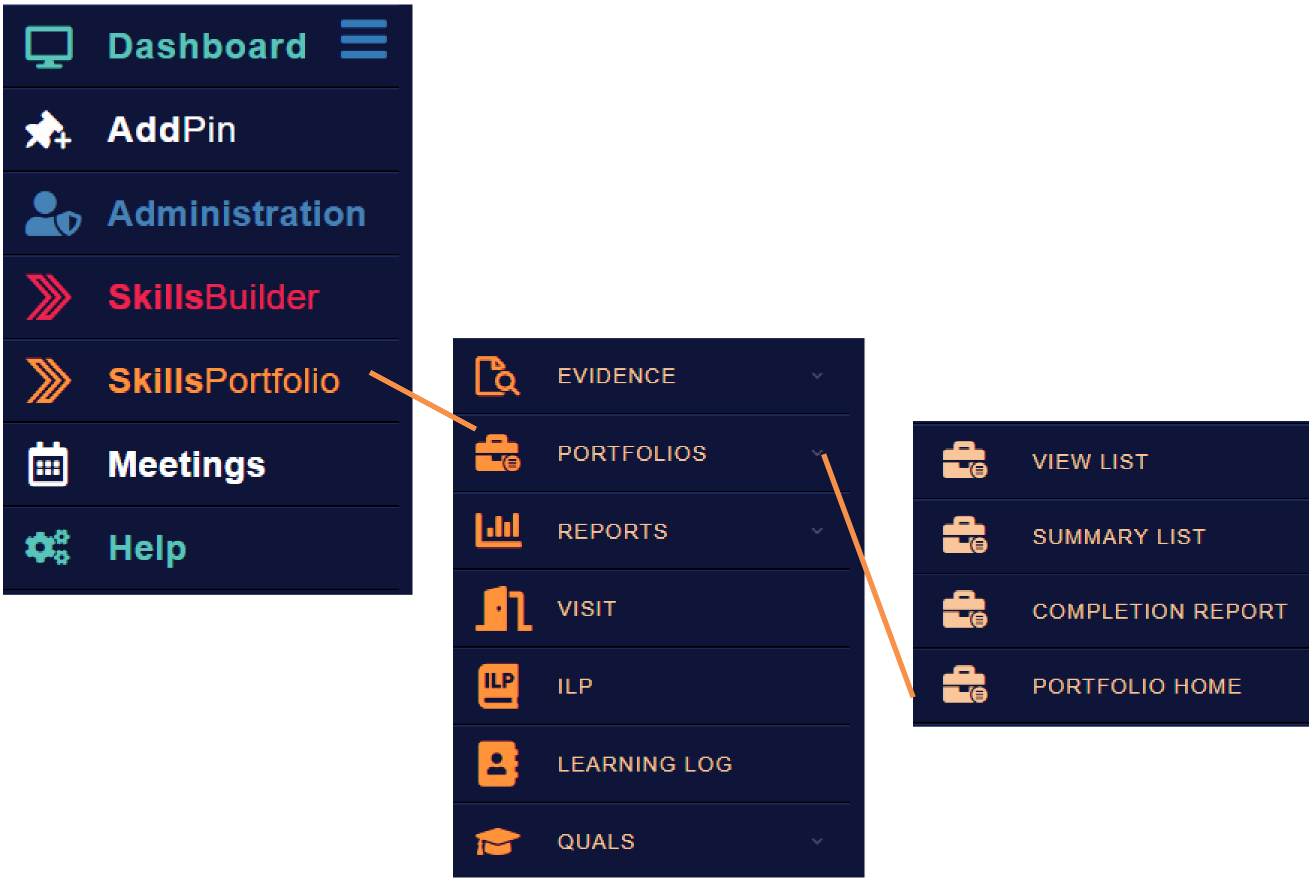
Depending on the tab you have selected you will be able to specify a **percentage** of evidence assessed to be displayed within the plan.



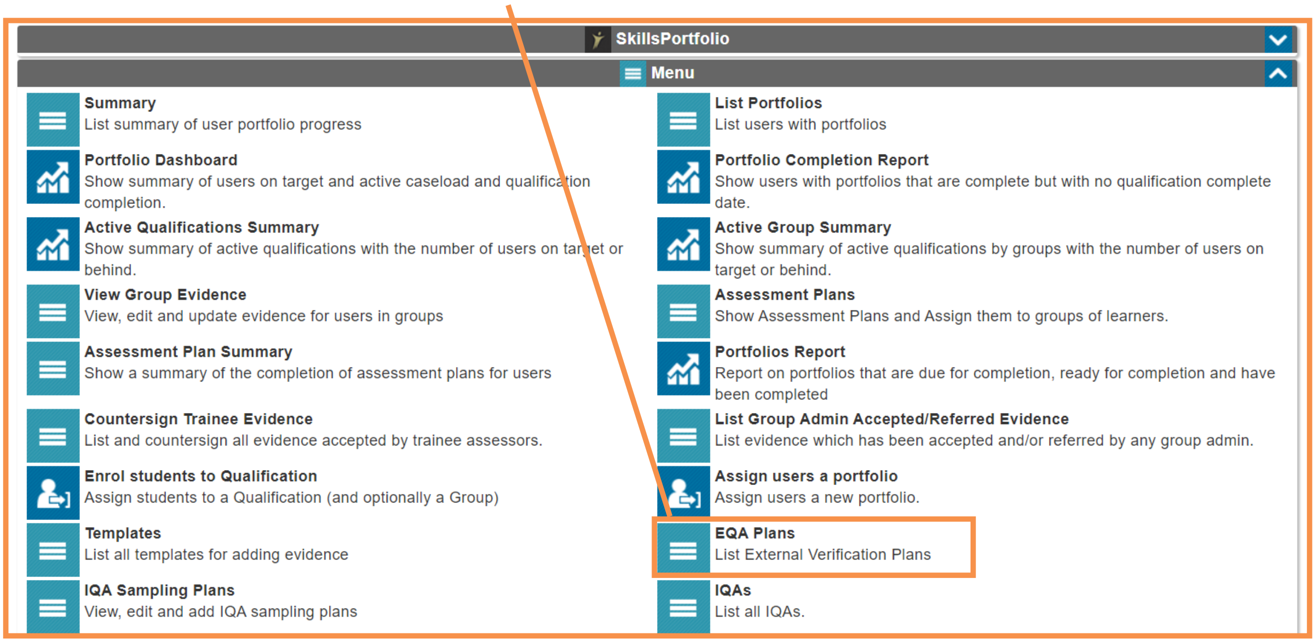
Repeat this process until the plan configuration is complete. Select **save** in order to finalise your changes.

Add Items to an EQA Plan

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.

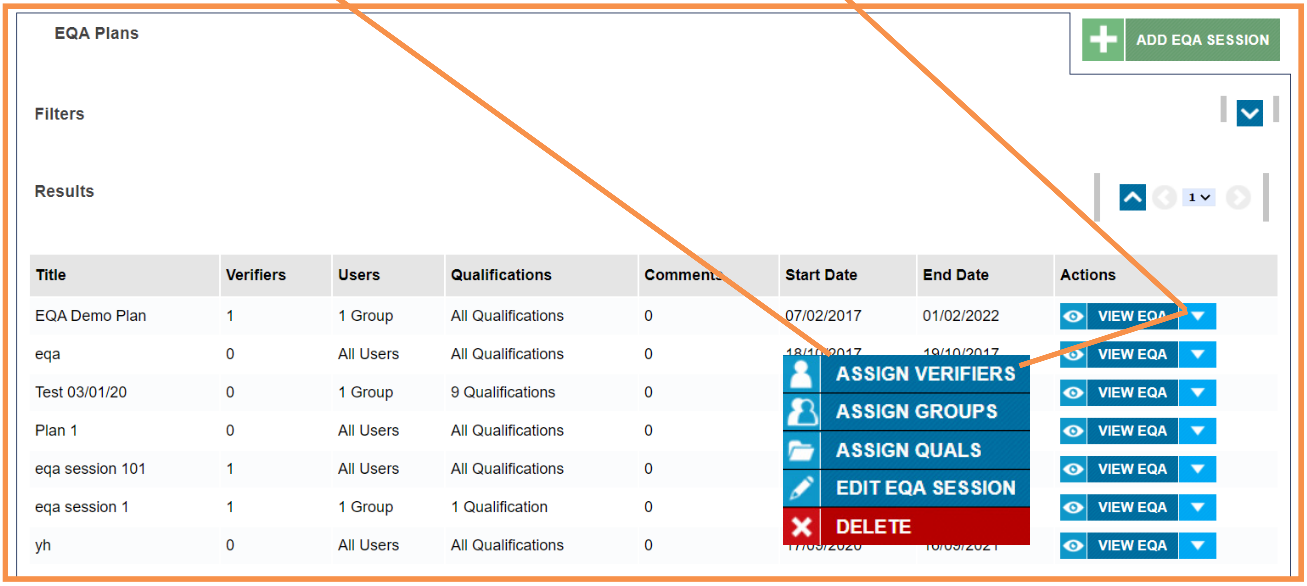


From this page select the **EQA Plans** option



Assign Verifiers to EQA Plans

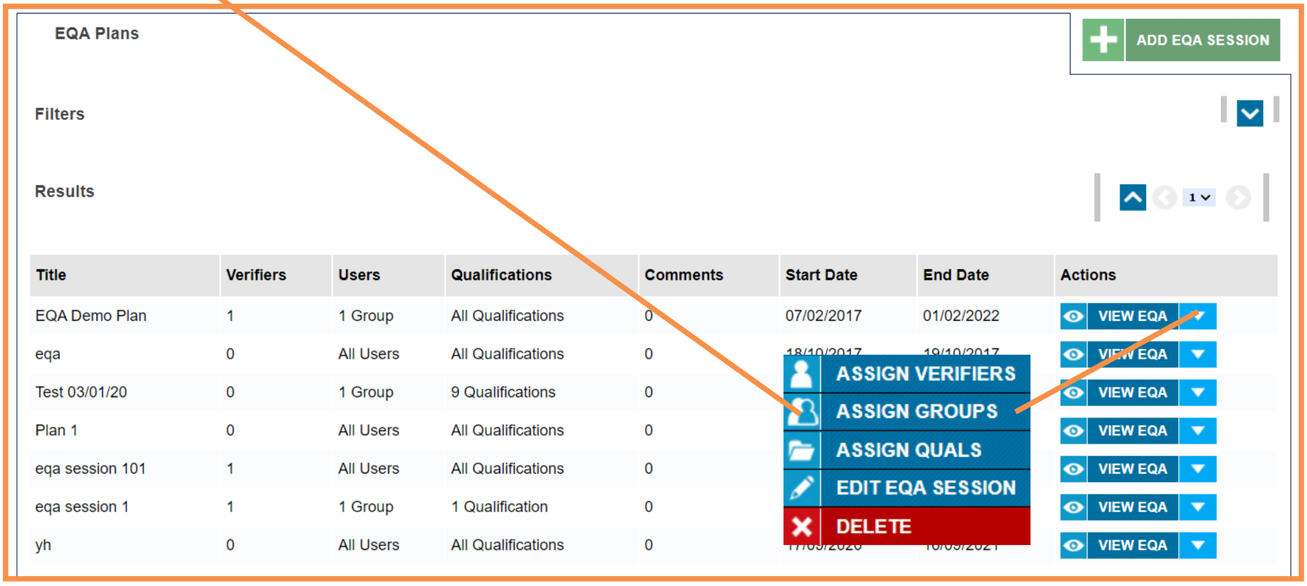
Here you will be able to see all open EQA plans
Select the **dropdown** that relates to the '**View EQA**' button you are to add items and select **Assign Verifiers** from the list.



A window will popup allowing you to **highlight** your **chosen EQA** for the plan. Be sure to select **save** in order to finalise your changes.

Assign Groups to EQA Plans

Then from the same dropdown list, select **Assign Groups**; this will allow you to **assign a group** in which the EQA will be able to access on the plan.

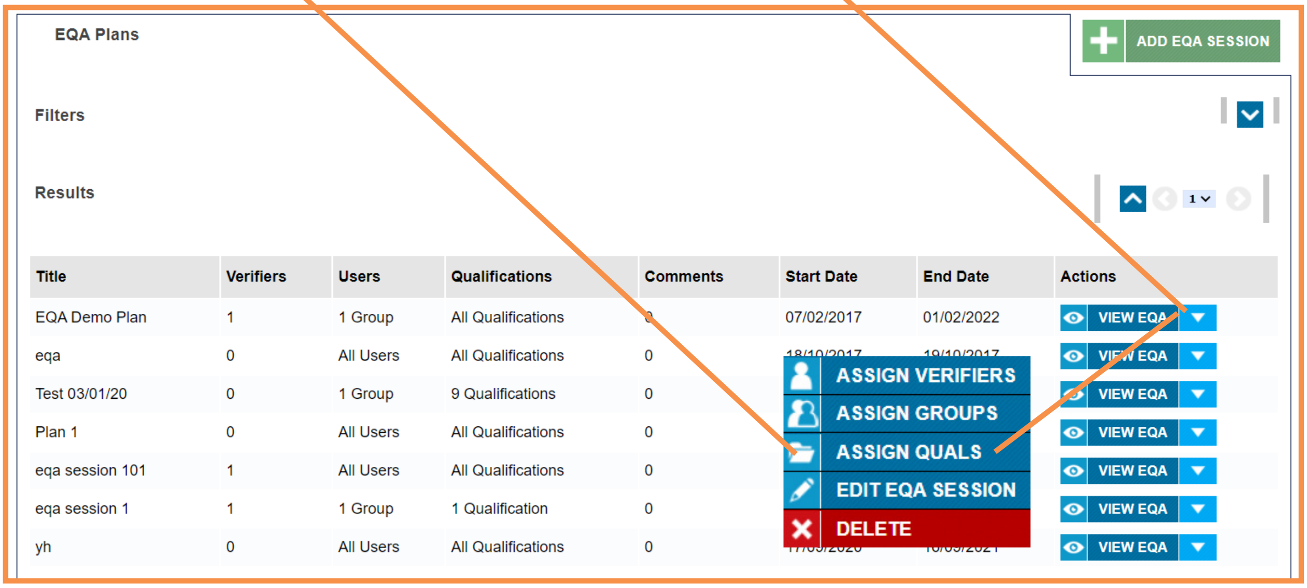


A window will popup allowing you to **assign** your **chosen Group** for the plan. Be sure to select **save** in order to finalise your changes.

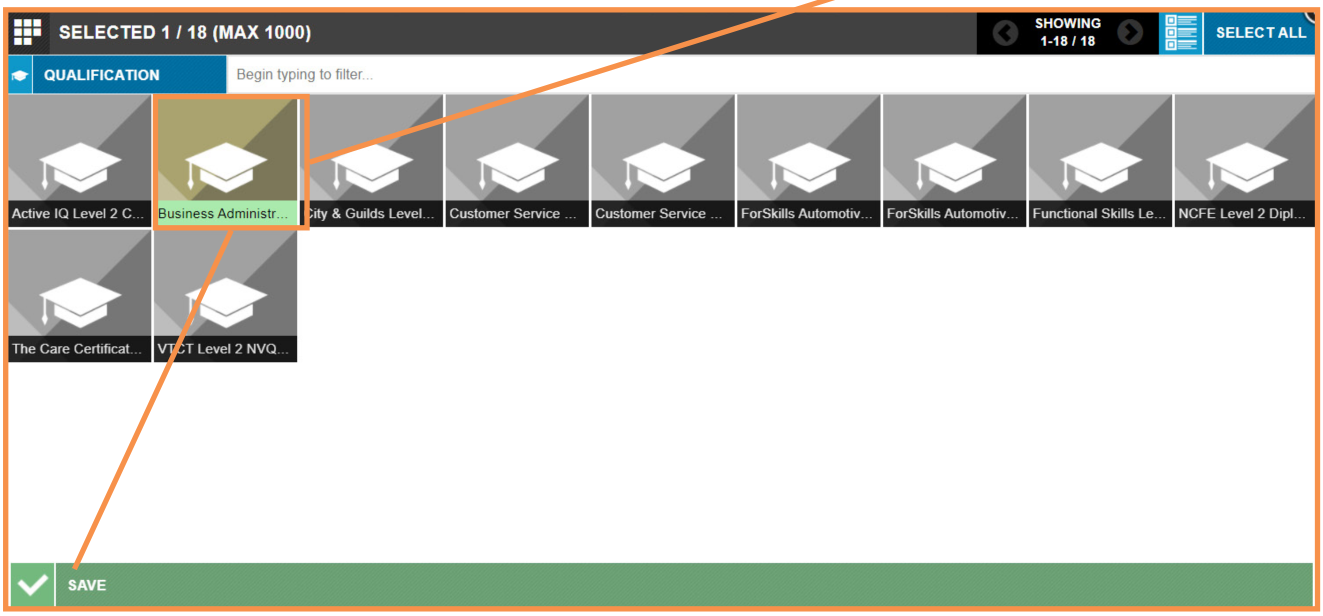
Assign Qualifications to EQA Plans

If necessary repeat this step once more ensuring you select assign qualification; this will allow you to assign a qualification, which will allow the EQA to view all evidence submitted against it on the plan.

Once again from the same screen as previously,
Select the **dropdown** that relates to the '**View EQA**' button you are to add items and select **Assign Quals** from the list.



A window will popup allowing you to **assign** your **Qualifications** for the plan. Be sure to select **save** in order to finalise your changes.

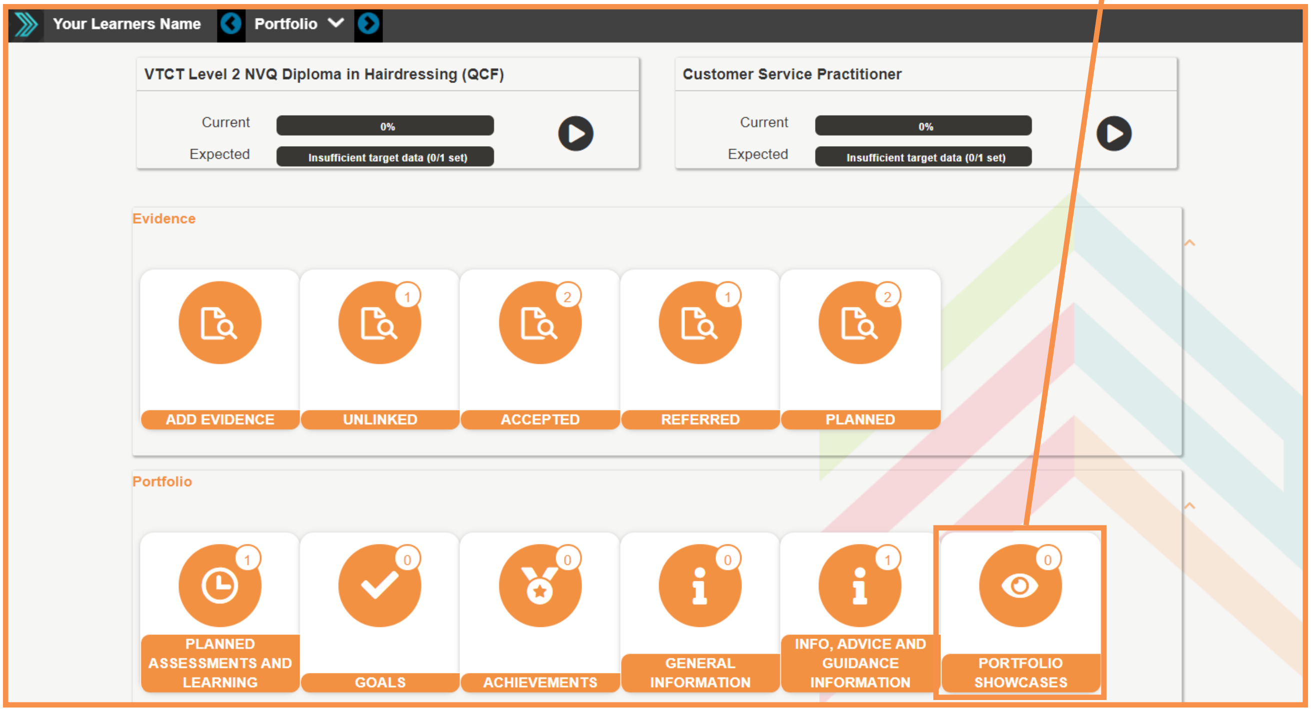


You have now successfully created this plan

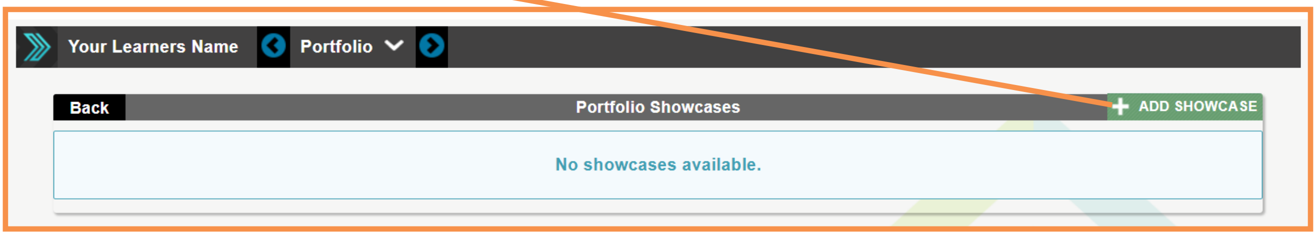
Showcase

Using guidance from page 12 "**How to Navigate to your Learners Portfolio**" find your learners portfolio and open it.

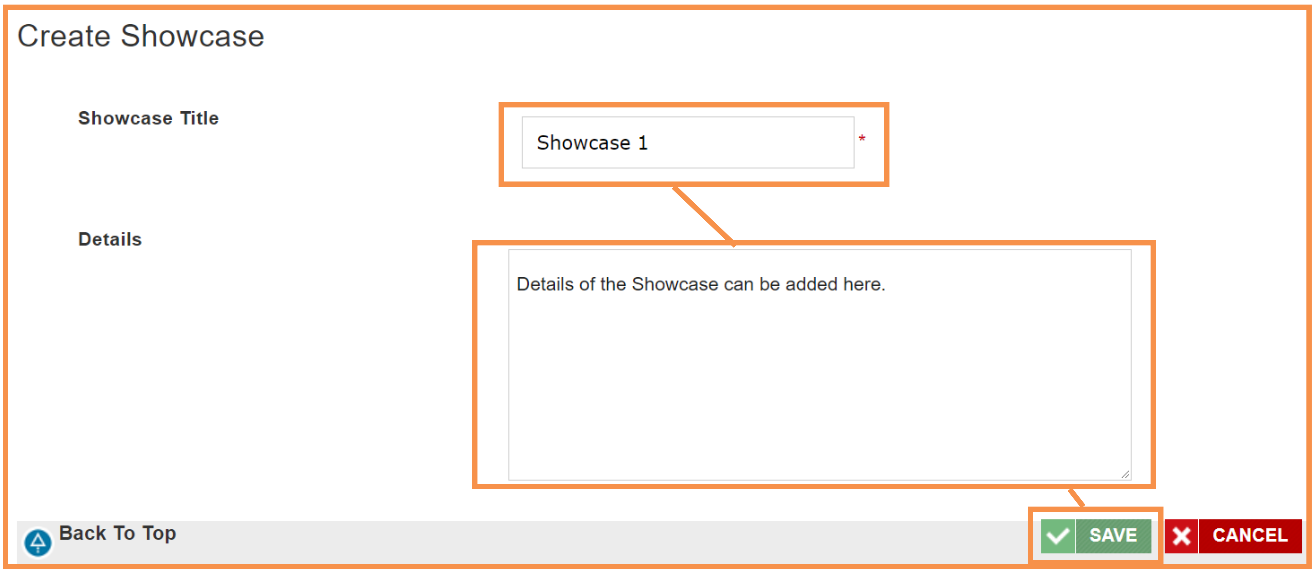
From the bottom of your Learners Portfolio page select **Portfolio Showcases**.



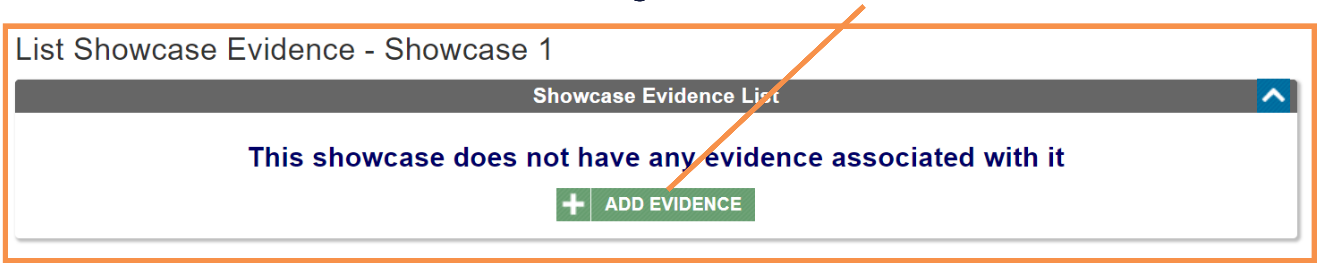
Select **Add Showcase.**



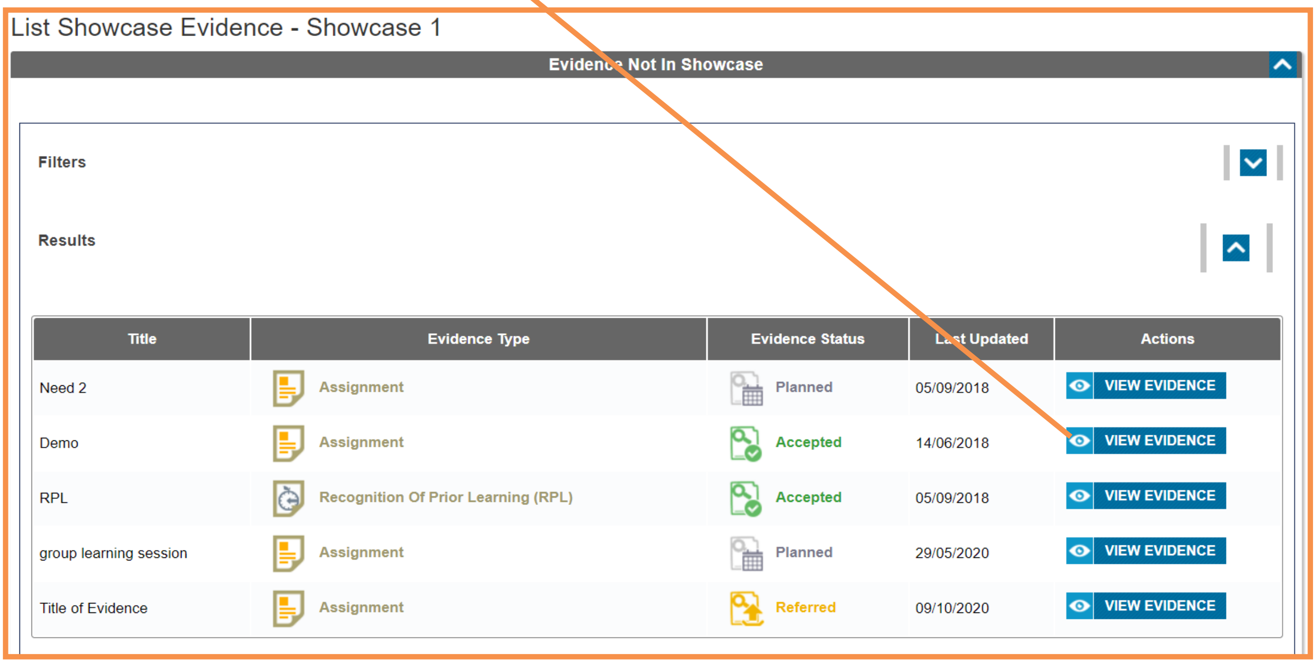
Add a **title** and optional **details** for the showcase
Select **save**



Add evidence to the showcase via the green **Add Evidence** button.



Select the **View Evidence** button that relates to the evidence you are aiming to add to the showcase.



Proceed to select the green **Add Evidence** button to finalise the assign to the showcase.

Proceed to select the green **Add Evidence** button to finalise the assign to the showcase.

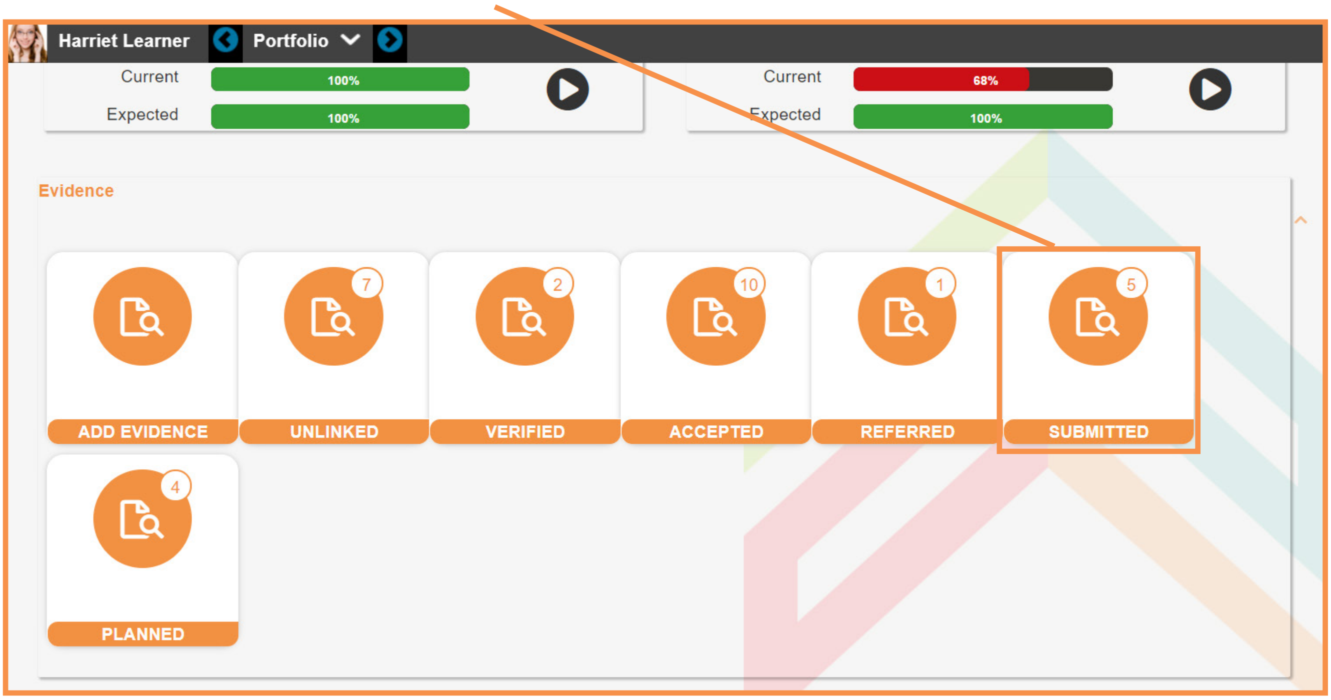
Repeat adding rest of evidence pieces until the showcase is complete.

How to Delete Evidence

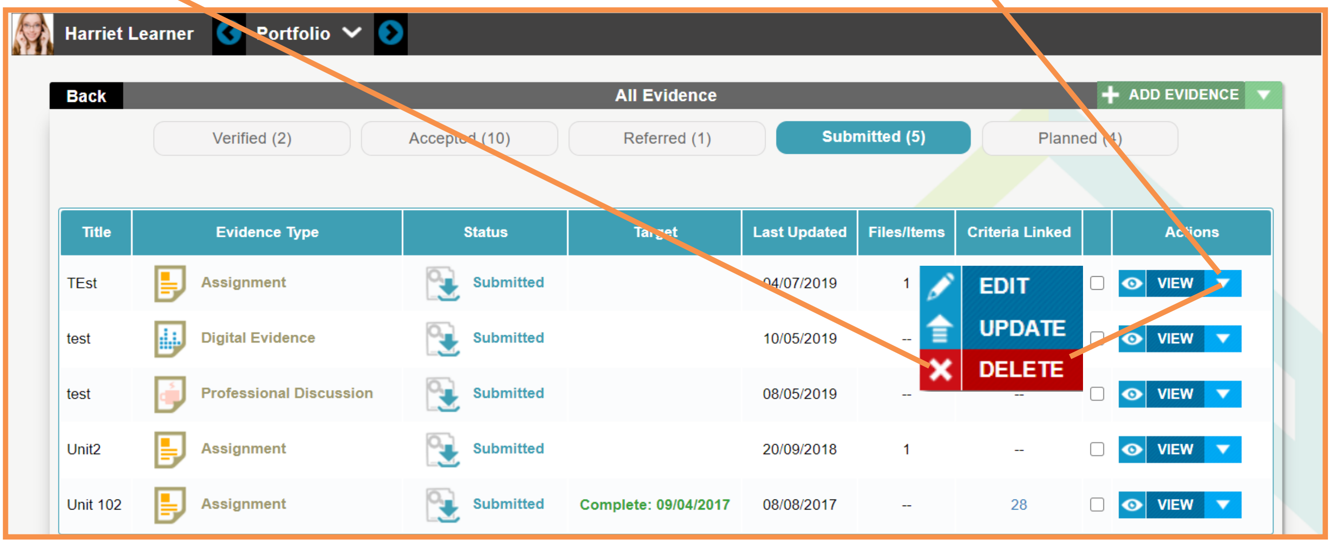
Note: Evidence **must be at the Submitted status** in order to be deleted. You **cannot delete planned or accepted evidence** without changing the status to 'submitted'.

Navigate to a learner's portfolio/profile following steps from Page 12.

Select the tile labelled '**Submitted**' under the Evidence section on the Portfolio.



Select the **drop down** located to the right of the **view button** that relates to the evidence you are aiming to delete.
Select **delete** from the drop down list.

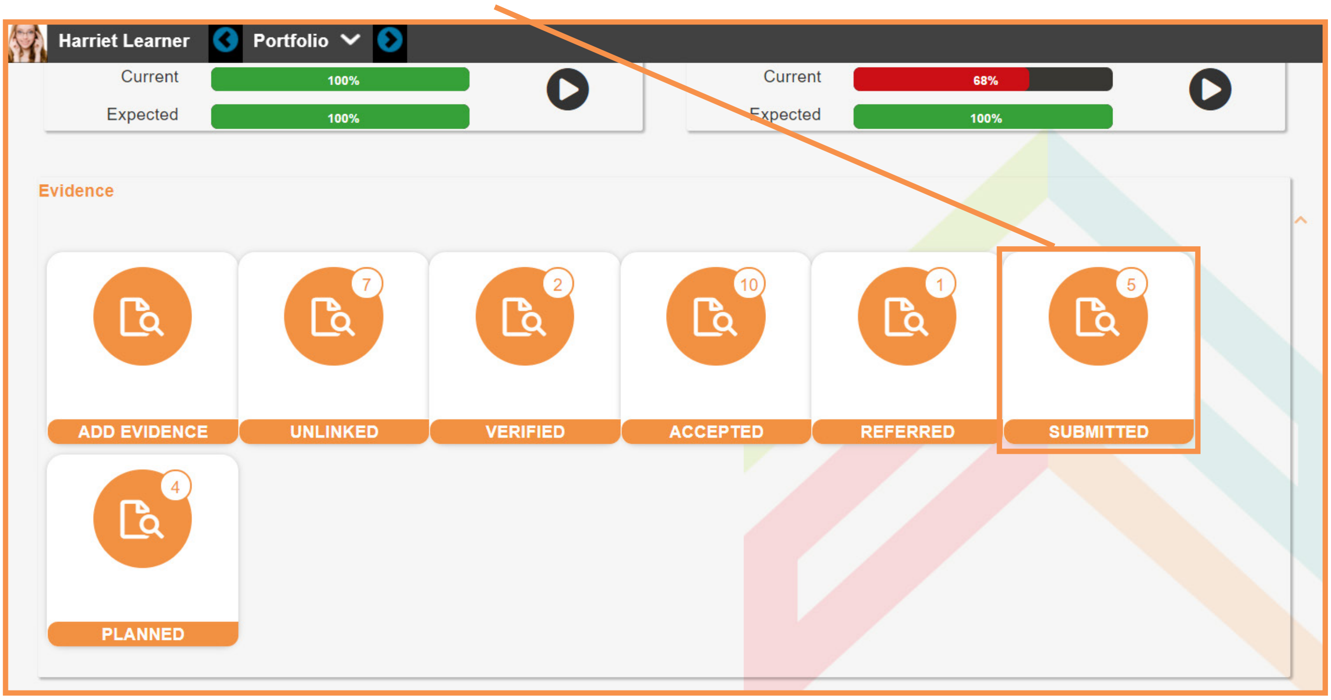


How to Merge Evidence

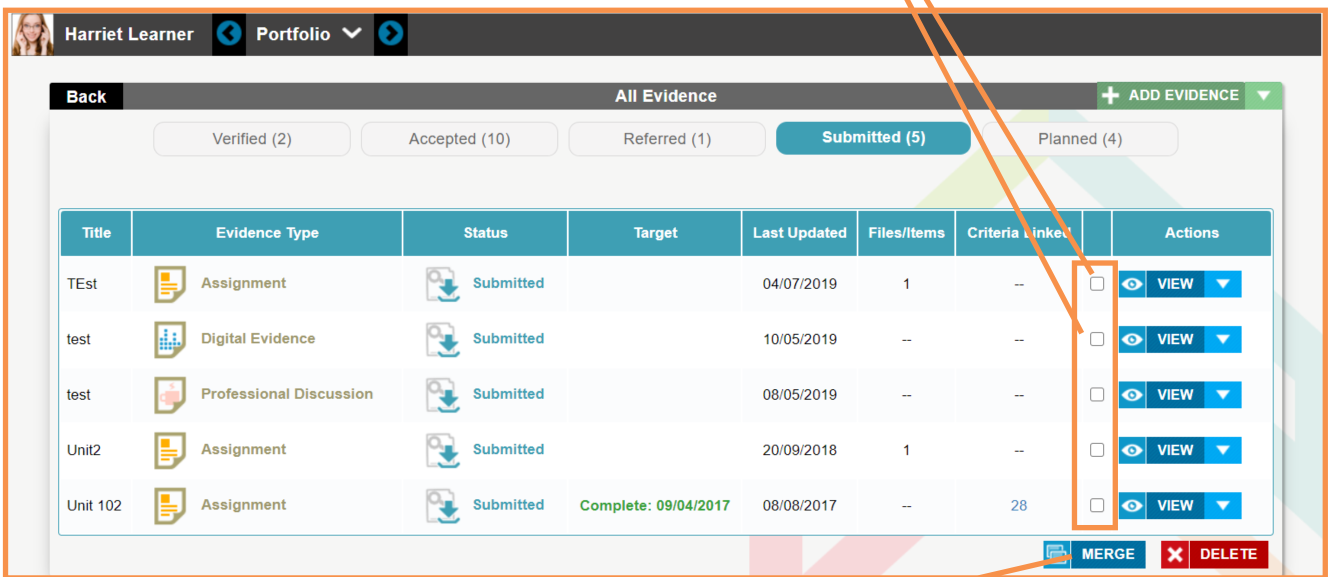
Note: Evidence **must be at the Submitted status** in order to be deleted. You **cannot delete planned or accepted evidence** without changing the status to 'submitted'.

Navigate to a learner's portfolio/profile following steps from Page 12.

Select the tile labelled '**Submitted**' under the Evidence section on the Portfolio.



You will notice a tick box relating to every unit **check the boxes** of evidence that is to be merged.



Scroll to the bottom of page and select **Merge.**

You will now be expected to **tick the circle** of the primary piece of evidence.

Merge Evidence

Title	Evidence Type	Status	Criteria Linked	Last Updated	Primary	Actions
TEst	assignment	Submitted	0	04/07/2019	◉	VIEW
test	digital_evidence	Submitted	0	10/05/2019	○	VIEW

MERGE

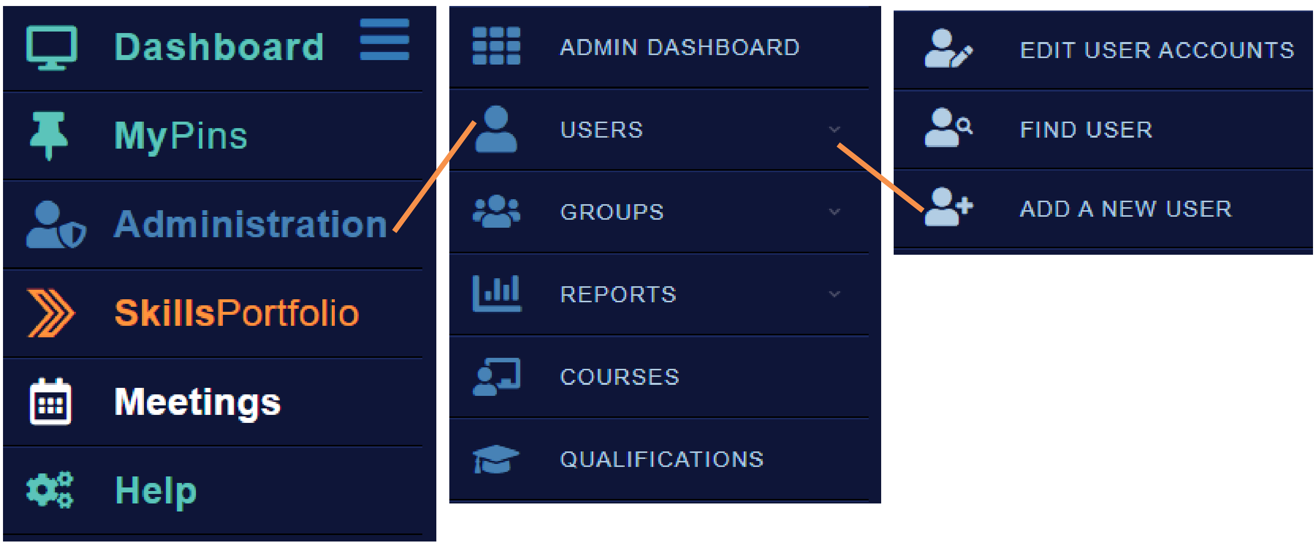
Select **Merge** to finalise the process.

How to give an Employer Access to Learner Profiles

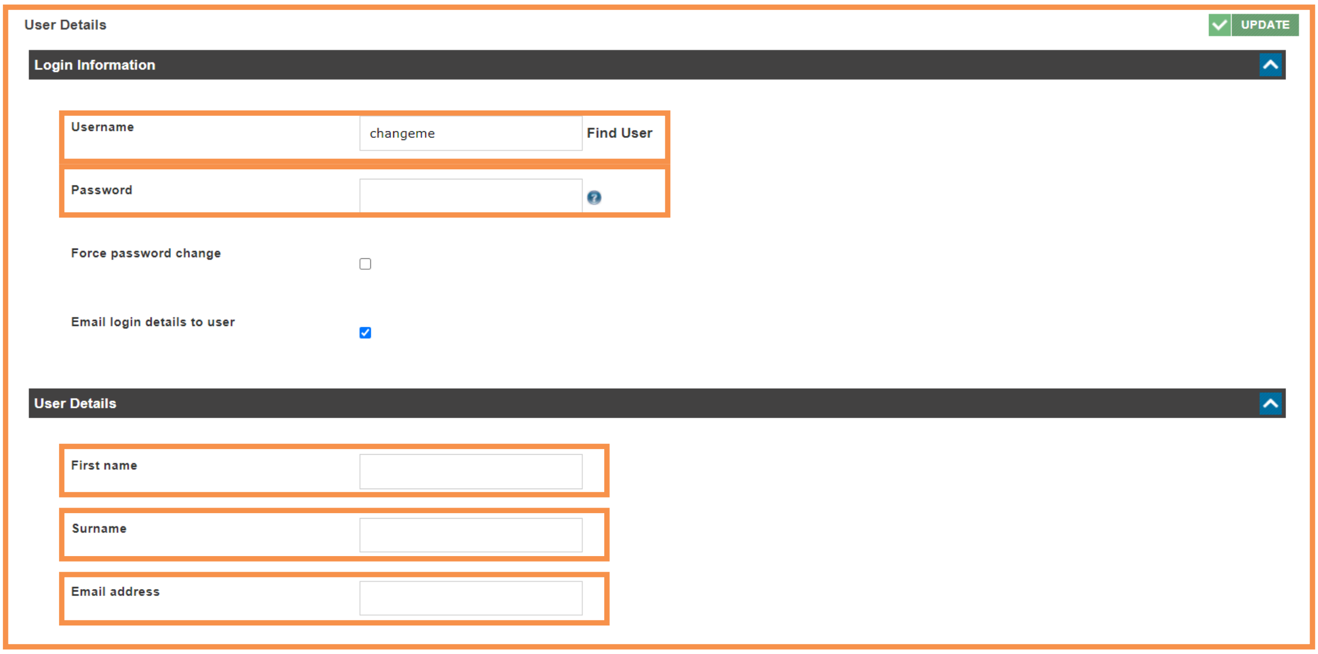
Adding an employer to the platform will give the external party view only access to a learner's portfolio and its progression.

Creating a Employer Profile

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon >
Select **add a new user.**



Next complete the mandatory fields:



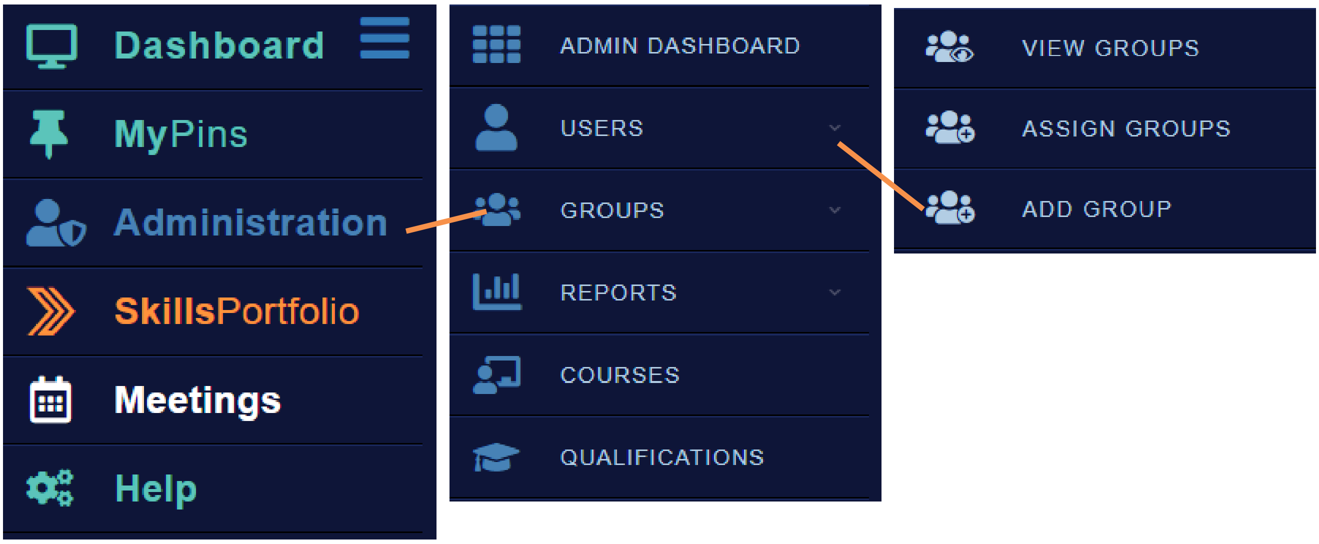
Username –create a username for your learner, there are no rules it just needs to be bespoke as no two usernames can be the same.
Password – if you know what the learners password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.
First name – specify the first name of your learner.
Surname – specify the surname of your learner.
Email address – specify the email address of your learner if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

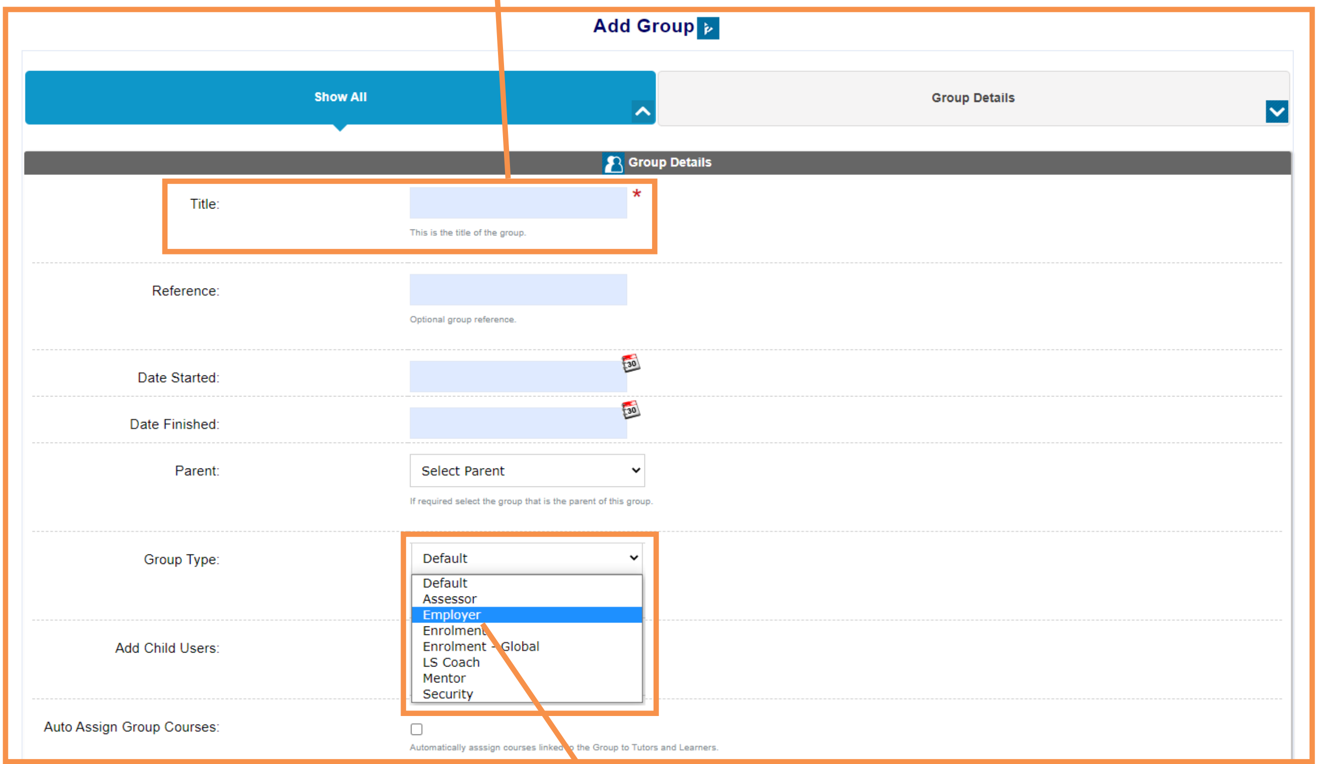
Select update to finalise the creation of this account. All that is left to do is create a group of learners for this employer to access.

Create an Employers Group of Learners

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **group's** icon > Select **Add group**.

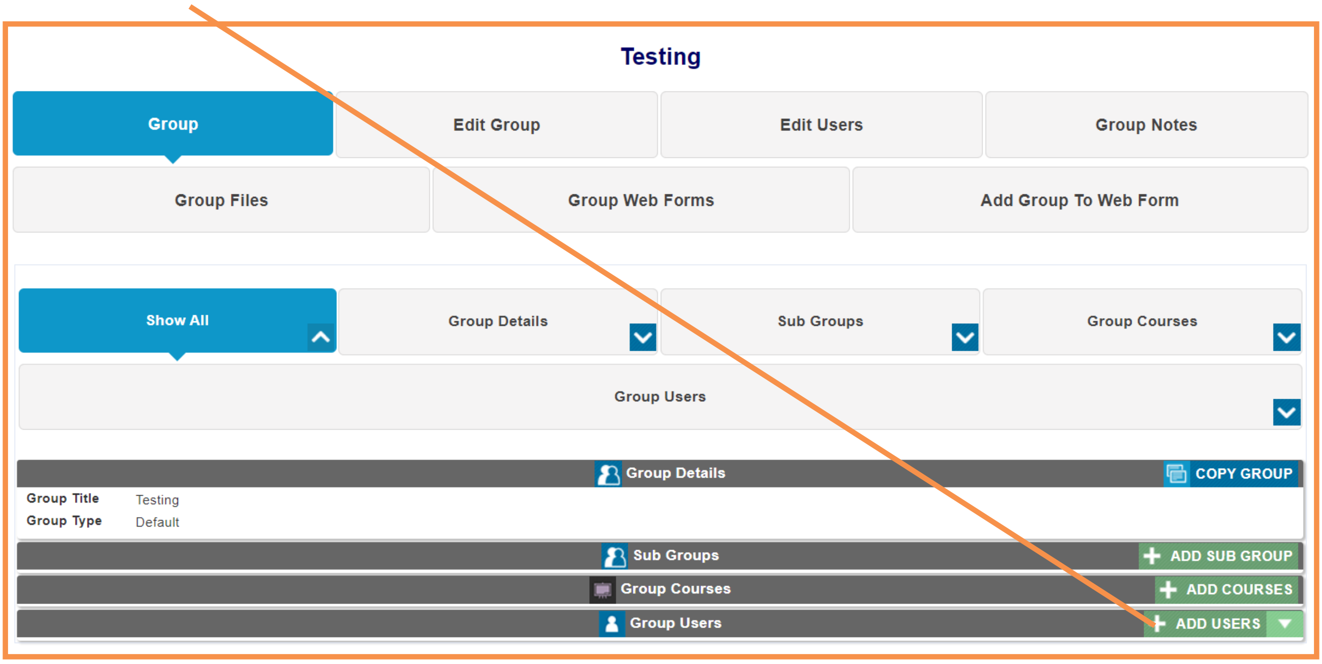


Proceed to give the group a **title**.

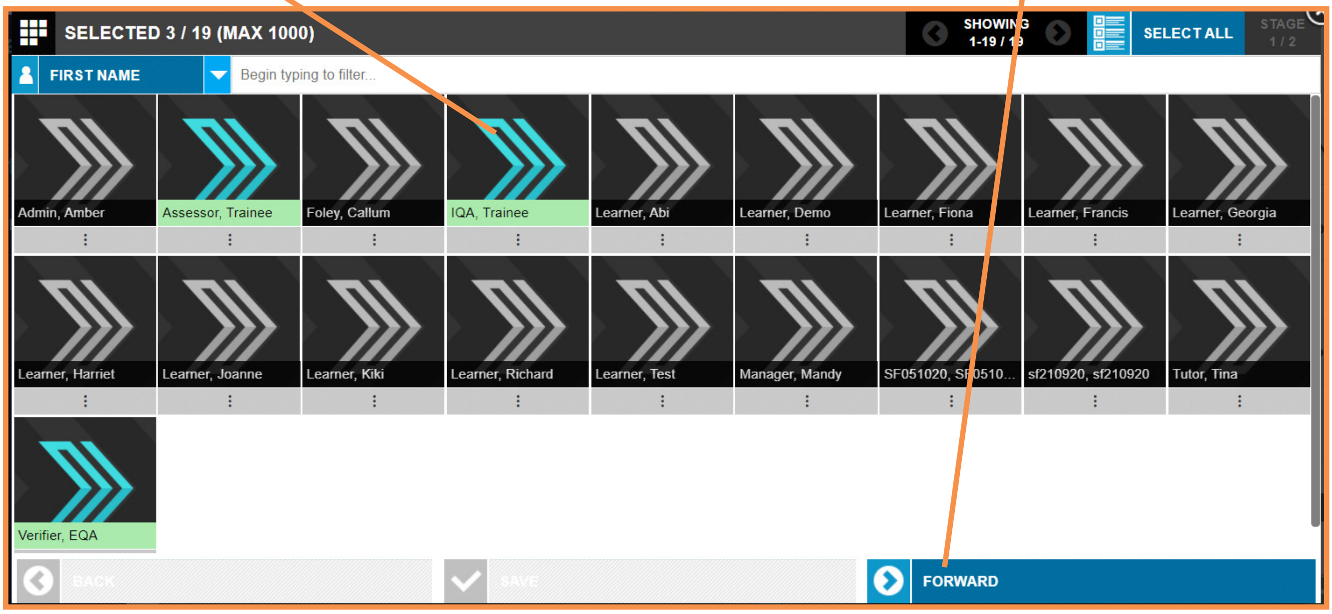


You must set the Group Type as **Employer**. Select **update** to create the group.

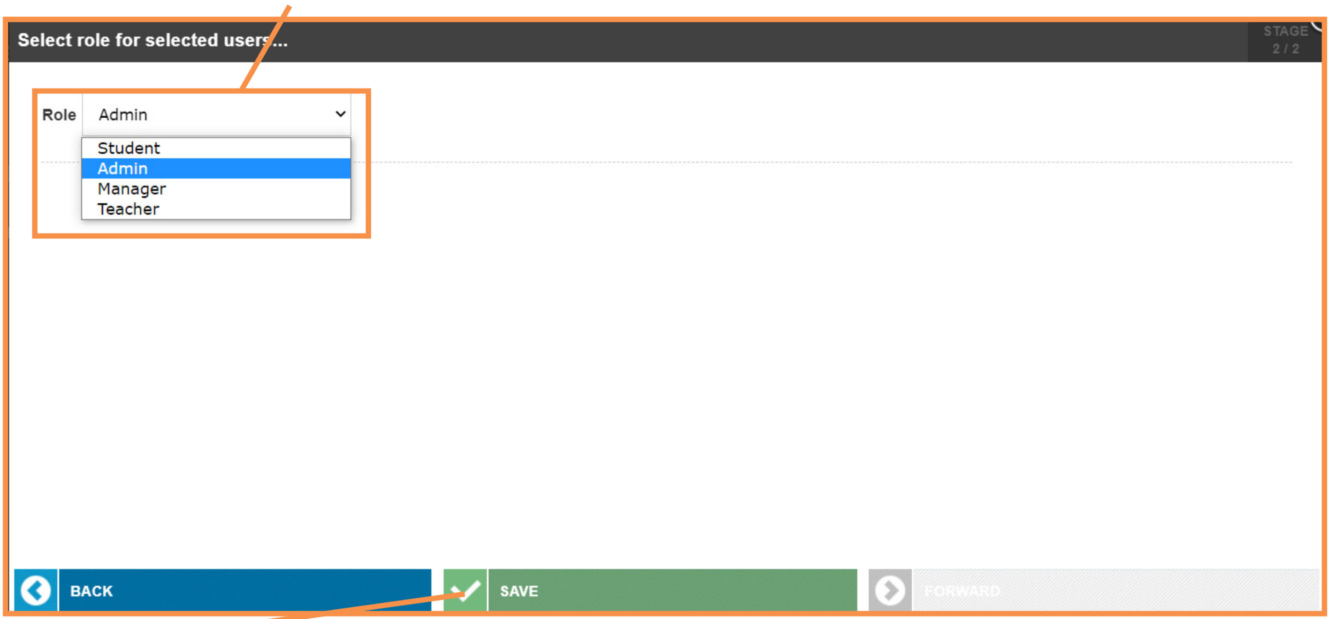
Select **Add Users**



Select the **Employer** you would like for this group. Select **Forward**

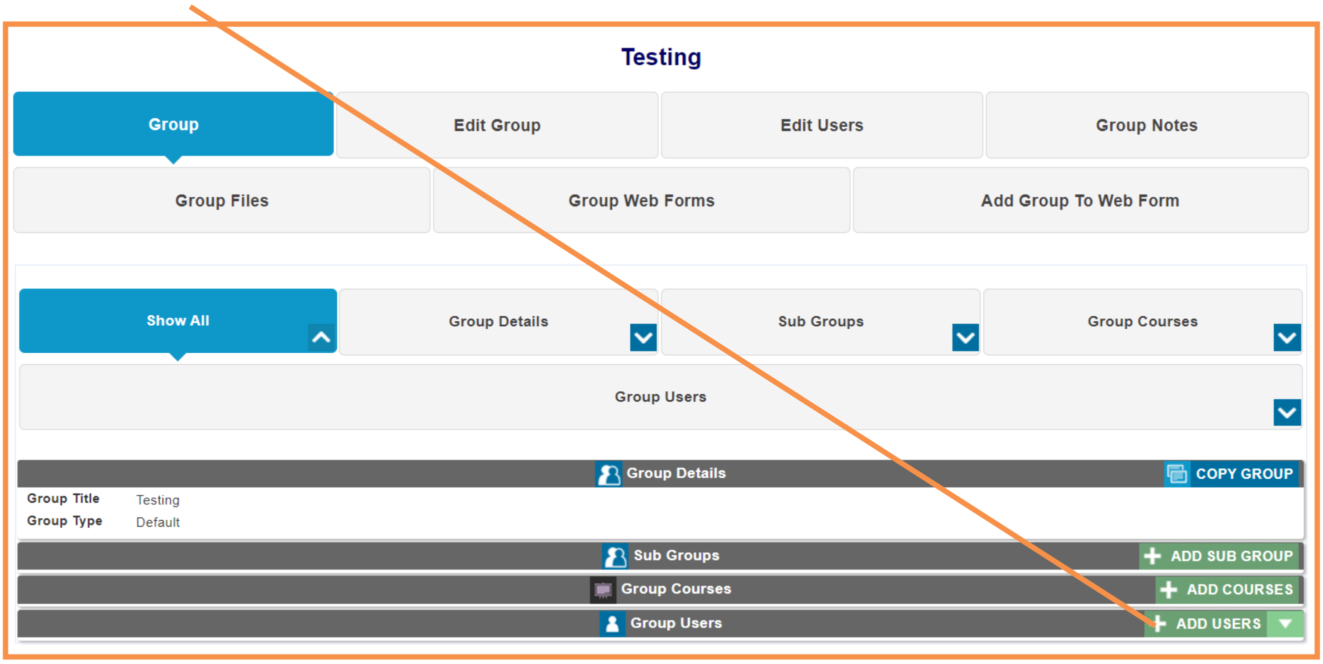


Select the **Manager role** from the dropdown.

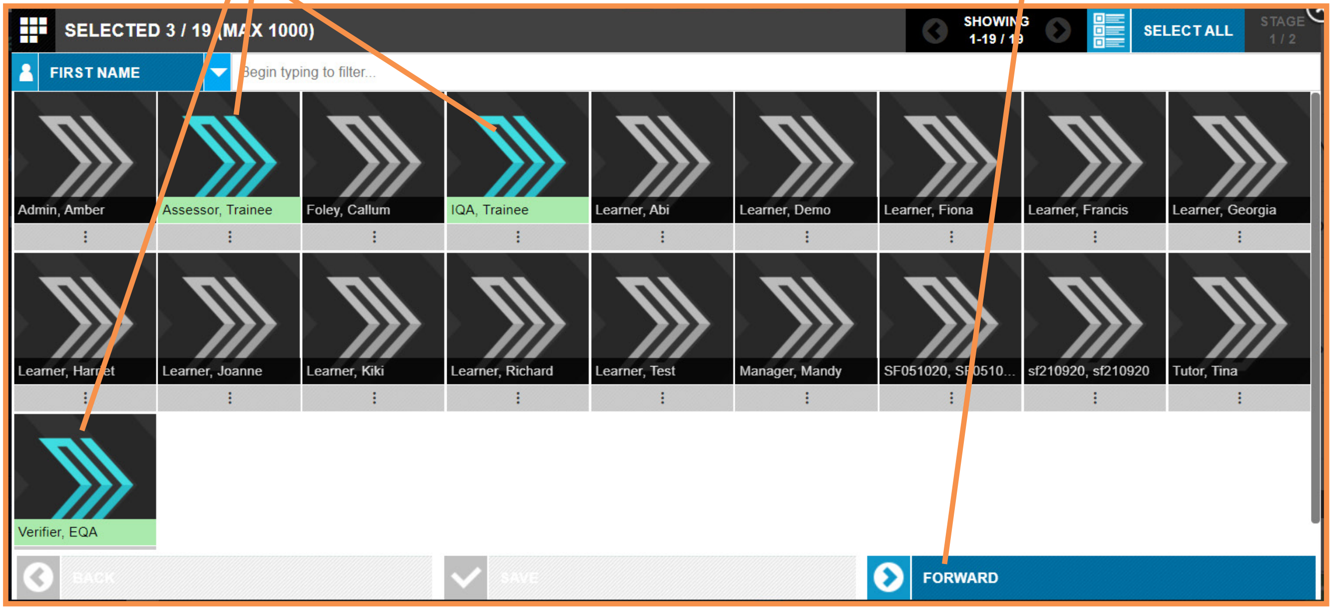


Select **Save** in order to assign an Employer to the group.

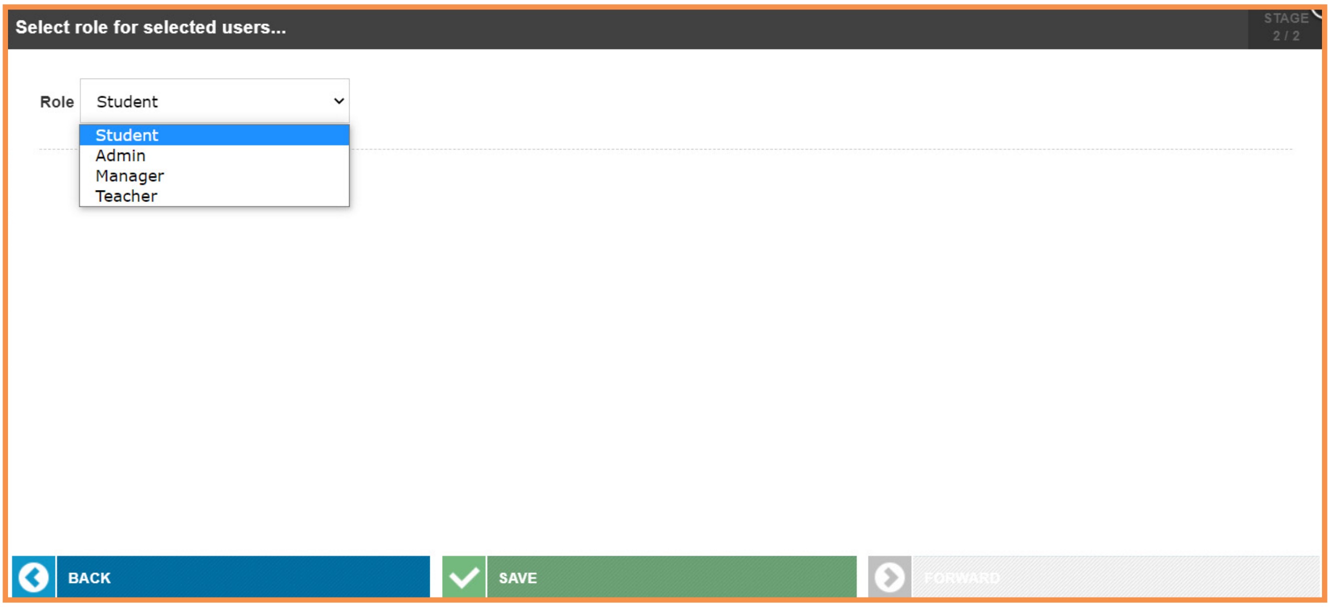
Select **Add Users**



Select the **Learner/s** you would like for this group. Select **Forward**



Select the **Student role** from the dropdown.



Select **Save** in order to assign an learners to the group.

Repeat steps to add Learners on **page 60**, any time an employer needs access to a new learner.

Skills Portfolio

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