

# Broker ASSESS administrator's guide

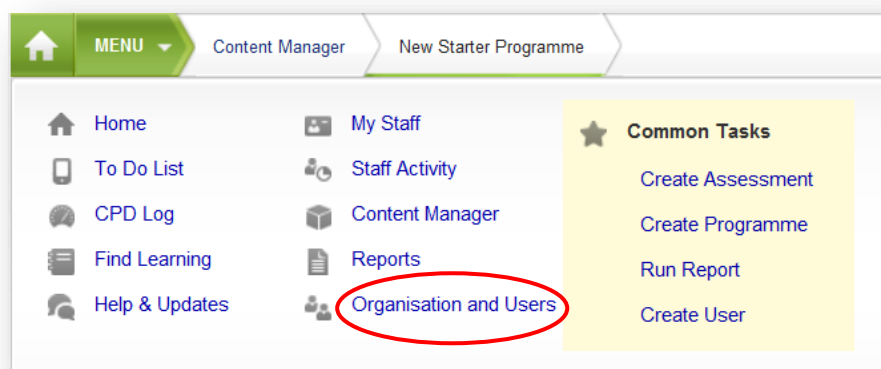
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This guide focuses on administrative tasks. Please consult the **Broker ASSESS user's guide** for a broad explanation of the following, which will not be covered within this guide:

- the Home page
- terminology
- types of activities and learning modules
- finding and registering for activities
- the To Do List
- recording and managing Continuing Professional Development (CPD)
- a user's own reports
- profiles.

## 1 Creating a new user

As an administrator, you may be required to create new users on the system. You can create new users by selecting the **Organisation and Users** link under the **Menu**.



Navigate within the organisation structure until you see the unit under which you wish to add the new user. When you hover over the unit, you will have the option to add a new sub-unit or to add a new user beneath that level. Select the **+ User** icon.

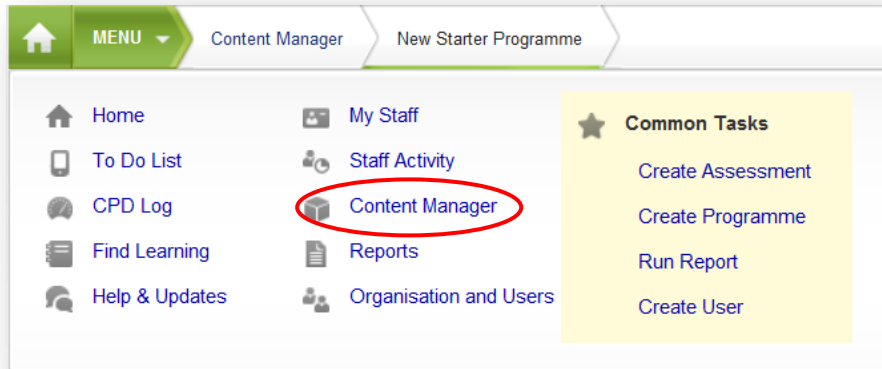
Complete the form with the new user's name, user name, email address and, if applicable, password then select **Next**. Confirm the details are correct on the following screen then select **Finish**.

The next screen will suggest a number of **Common Tasks** which you may like to undertake, such as **Set user roles**, **Add training** and **Set supervisor**. Either work through these Common Tasks or through the options in the left hand menu to set up the new user's profile.

## 2 Content Manager

From the Content Manager you can allocate learning to staff, create assessments and create new learning programmes.

Select the **Content Manager** link from the **Menu** to access this area.

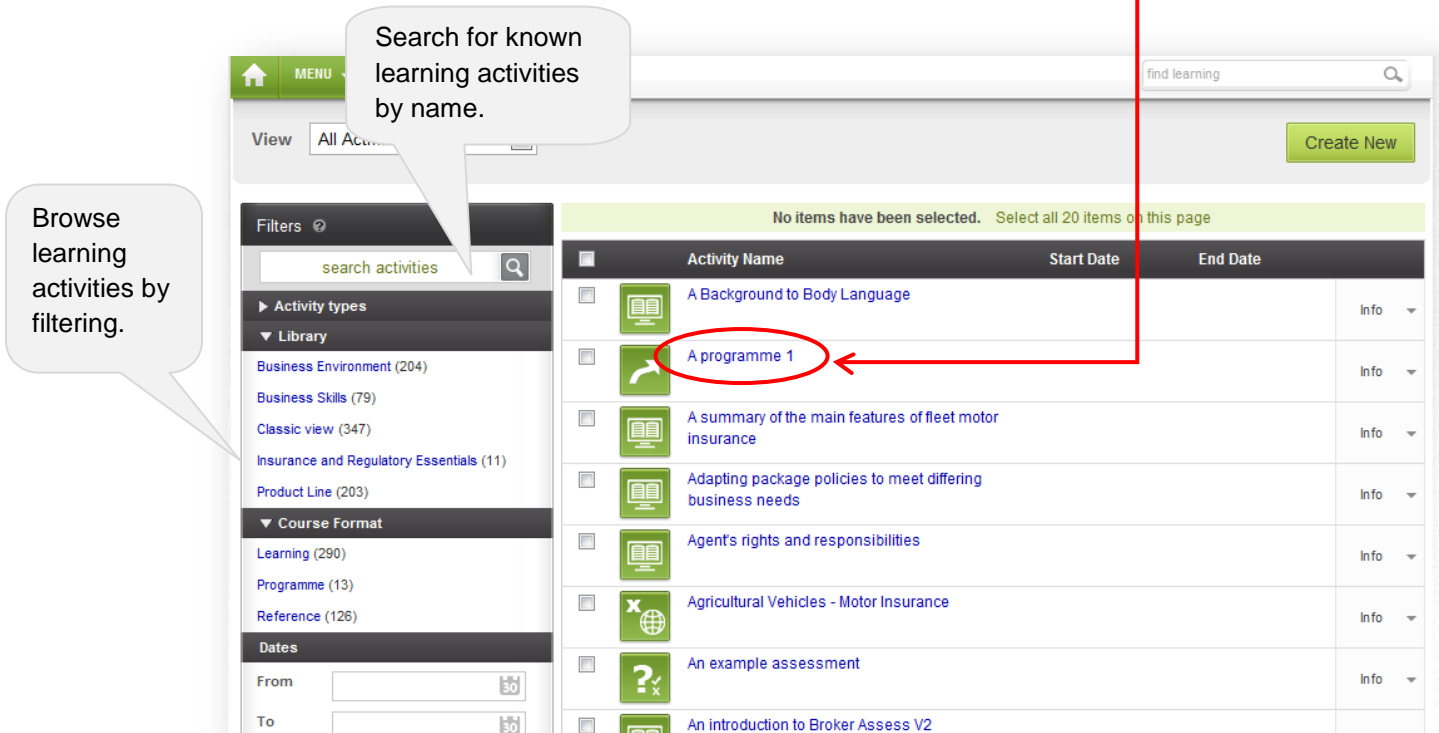


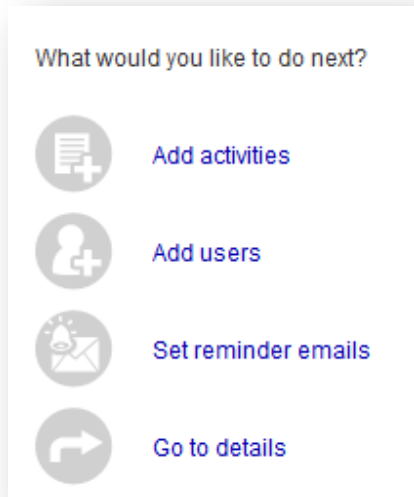
### 2.1 Allocate learning

When you first access **Content Manager** you will be presented with a list of all the training activities available to you and your staff.

If you know the name of the learning activity on which you wish to register your staff, you can search for this by using the **search activities** box under the **Filters** section on the left of the screen. Alternatively you can browse using the links below the search box to filter the activities.

Click on the name of the activity on which you wish to register your staff.





Once you have selected your chosen activity, you will be presented with a **Common Tasks** page with a left hand and central menu, the latter of which is illustrated here. You can register a user onto the activity by clicking on **Add users** on the central menu, or view staff currently registered on the activity by selecting **Users** on the left hand menu.

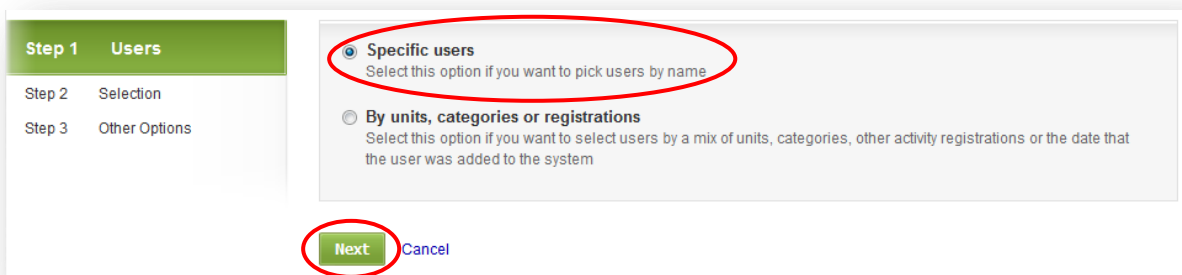
If you select **Users** you will be able to view a list of those users who have already been registered onto the learning activity, the date on which they were registered, the due date for the completion of the activity (if this was entered as part of the registration process) and the current status for each individual's progress against the activity. If the due date for

completion of the activity has passed and it is not yet complete, the due date will be highlighted in red.

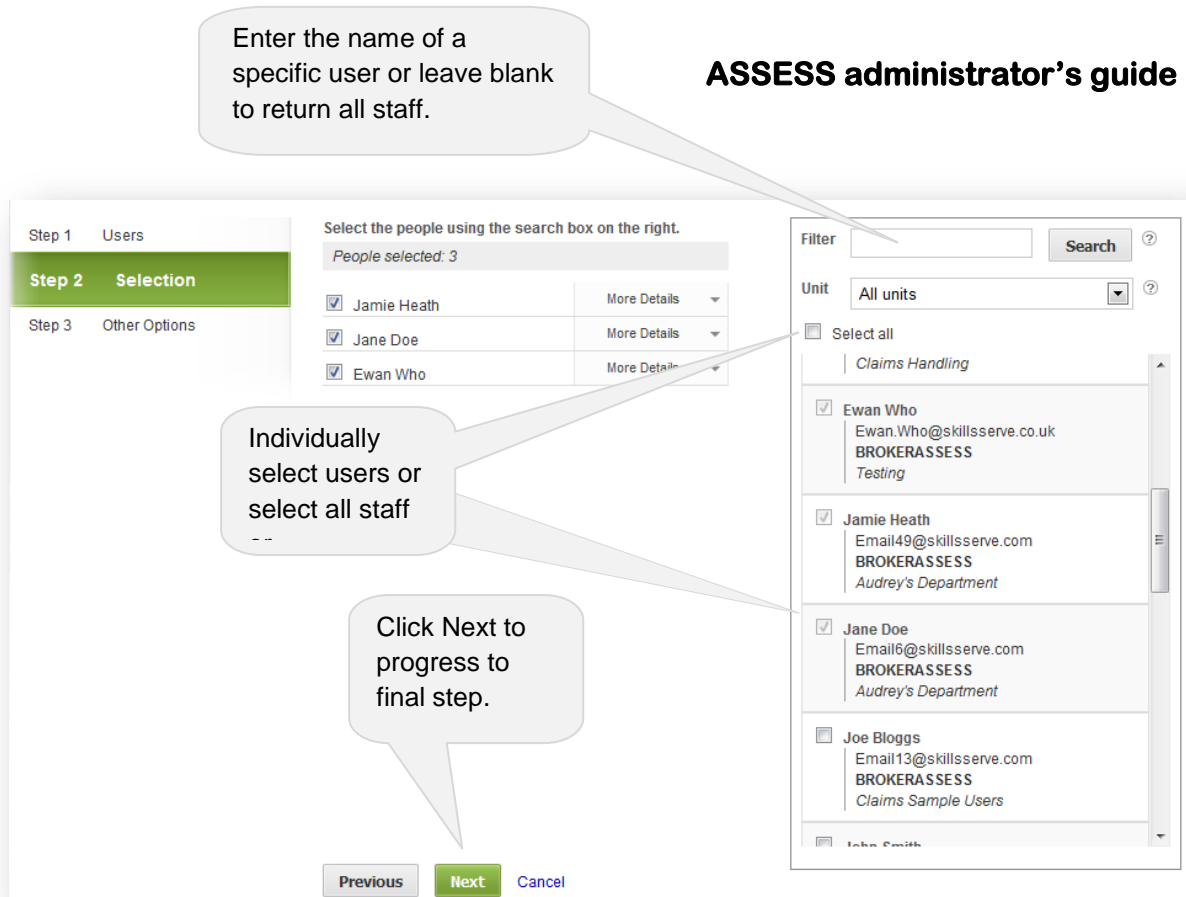
To register a new user or group of users onto the activity, either select the **Add users** link from the **Common Tasks** central menu or select the green **Register** button above the list of staff on the **Users** page.

### 2.1.1 Adding users

By selecting **Register** you will launch a three step registration wizard. The first step prompts you to either select **Specific users** or select **By units, categories or registrations**. Leave the selection as the default **Specific users** option then select **Next** to continue to the second step of the wizard.



Enter the name of a specific user into the **Filter** field, or leave the **Filter** field blank and click **Search** to return the names of all your staff. You then have the option of either individually selecting users by placing a tick within the check box next to their name or by selecting all your staff by placing a tick in the **Select all** check box. Your selected users will appear in a list in the centre of the page. Once you are happy with your selection, click **Next** to go to the third and final step of the wizard.



On the final step of the wizard you have to state the rules for existing registrations (if applicable) and decide whether or not you wish to enter a due date for the completion of the activity. You can choose to ignore both options and click **Finish** to complete the registration process or select as appropriate.

If, for example, you wish your staff to retake a module on an annual basis with a clear status, you can select the **Reset progress** option. The user will still have a record of their completed training activity within the **Completed Activities** section of their **To Do List**, however, the status of the activity on which they are registered will be returned to **Not Started**. If you wish to ensure that your staff have completed the activity before resetting the status, you should select the second option below.

If you wish to set a due date by when the user should aim to have completed the training activity, select the **Set due date** option. This feature enables you to either enter a specific date or choose one of the other options to set the due date x number of weeks, months or years from the criteria selected. Click **Finish** to complete the registration process.

Use the following options to set when to register selected users, reset activity progress and set deadline dates to complete this activity.

Existing registrations

Reset progress ?

Only for registrations older than 12 Months

Only if completed

Due Date

Set due date

Specify a date 31/07/2012

Specify a date from user creation date 12 Months

Specify a date from last completion 12 Months

Specify a date from last due date 12 Months

Keep the planned end dates for existing registrations

Previous **Finish** Cancel

Set rules for existing registrations if applicable

Select if you wish to set a due date for activity completion.

### 3 Creating assessments

At the top right of the Content Manager page is a green **Create New** button. When you hover over this button you will be presented with two options, one of which is **New Assessment**. (You can also select **Create Assessment** from **Common Tasks** in the top left dropdown **Menu** next to the **Home** button).

After selecting **New Assessment**, you will be asked to type in a name for the new assessment within the **Name** field of a pop-up window. Then select **Create Assessment** to progress to the next step. The next page will suggest a number of **Common Tasks**, as illustrated here, and a left hand menu. By working through the tasks, you can add questions to the assessment, allocate the test to users and, if applicable, set reminder emails. Alternatively, you can work through each of these options in the left hand menu.

What would you like to do next?

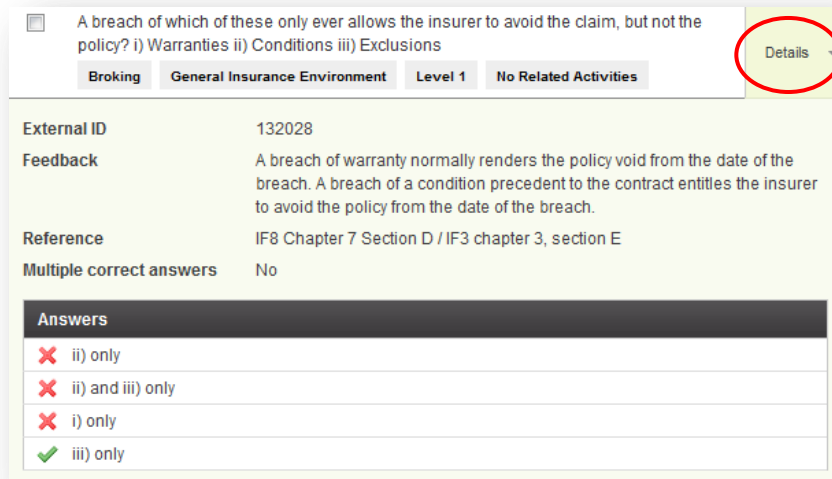
- Add questions
- Add users
- Set reminder emails
- Go to details

#### 3.1 Add questions

Select the **Add questions** link from the **Common Tasks** central menu or **Questions** from the left hand menu. The questions for an assessment must be selected from the question bank already uploaded onto the system.

If you know the question you wish to add, type all or part of the stem of the question into the **search questions** box under **Search**. Otherwise, you can browse the question bank using the links below the search box to filter the questions.

The questions available will be displayed in the centre of your screen. If you wish to see more information about each question, selecting the Details option to the right of the question will expand to show what attributes are attached to that individual question, including the answers.



A breach of which of these only ever allows the insurer to avoid the claim, but not the policy? i) Warranties ii) Conditions iii) Exclusions

Broking General Insurance Environment Level 1 No Related Activities

External ID 132028

Feedback A breach of warranty normally renders the policy void from the date of the breach. A breach of a condition precedent to the contract entitles the insurer to avoid the policy from the date of the breach.

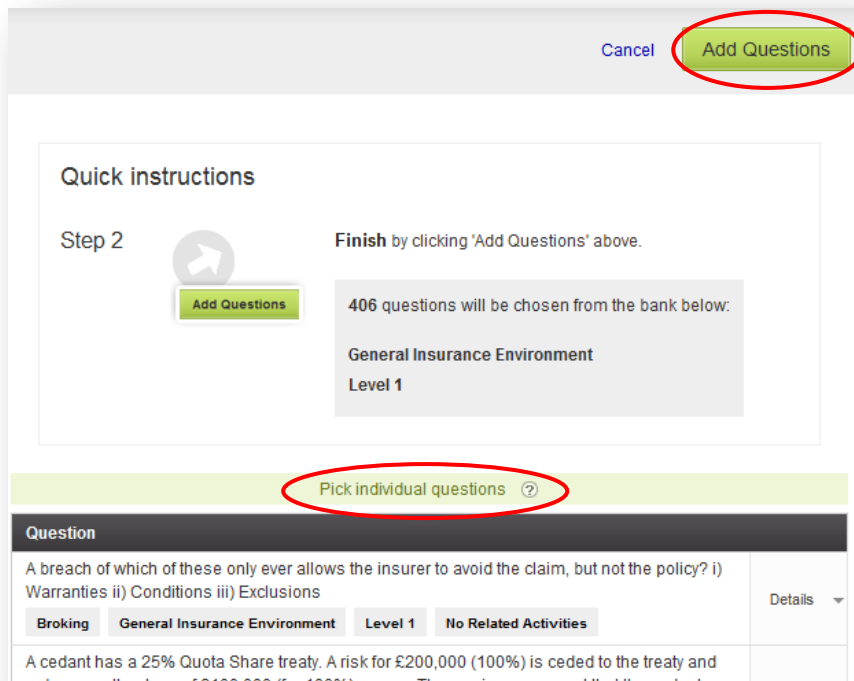
Reference IF8 Chapter 7 Section D / IF3 chapter 3, section E

Multiple correct answers No

Answers


- ✗ ii) only
- ✗ ii) and iii) only
- ✗ i) only
- ✓ iii) only

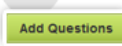
If you wish to select all the questions in the list, select the green **Add Questions** button at the top right of the page. If you wish to select individual questions, select the **Pick individual questions** link just above the list of questions, then select the desired questions putting a tick in the check box to the left of the question before selecting the **Add Questions** button.



Cancel Add Questions

Quick instructions

Step 2  Finish by clicking 'Add Questions' above.

 406 questions will be chosen from the bank below:

General Insurance Environment  
Level 1

[Pick individual questions ?](#)

Question

A breach of which of these only ever allows the insurer to avoid the claim, but not the policy? i) Warranties ii) Conditions iii) Exclusions

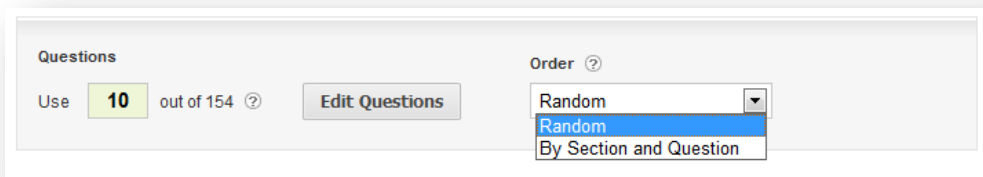
Broking General Insurance Environment Level 1 No Related Activities

Details

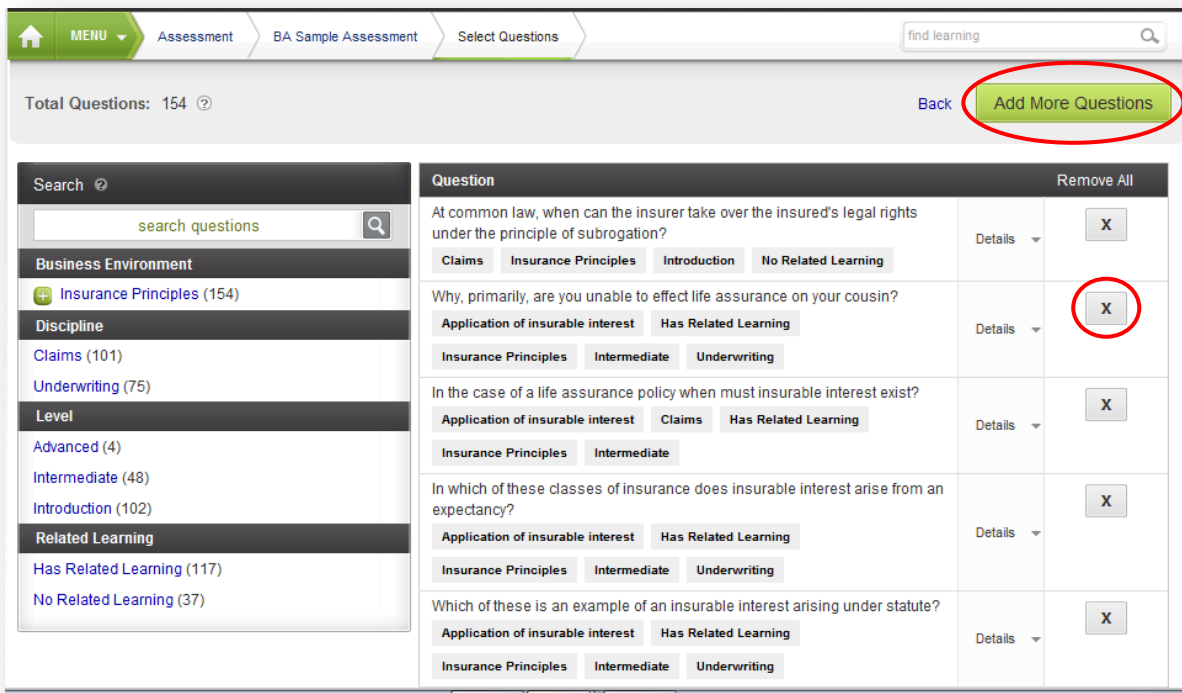
A cedant has a 25% Quota Share treaty. A risk for £200,000 (100%) is ceded to the treaty and subsequently a loss of £100,000 (for 100%) occurs. The maximum amount that the cedant can

Once the questions have been selected you can choose how many questions you wish the system to select from the pool of questions you have chosen for the assessment and in which order to display them.

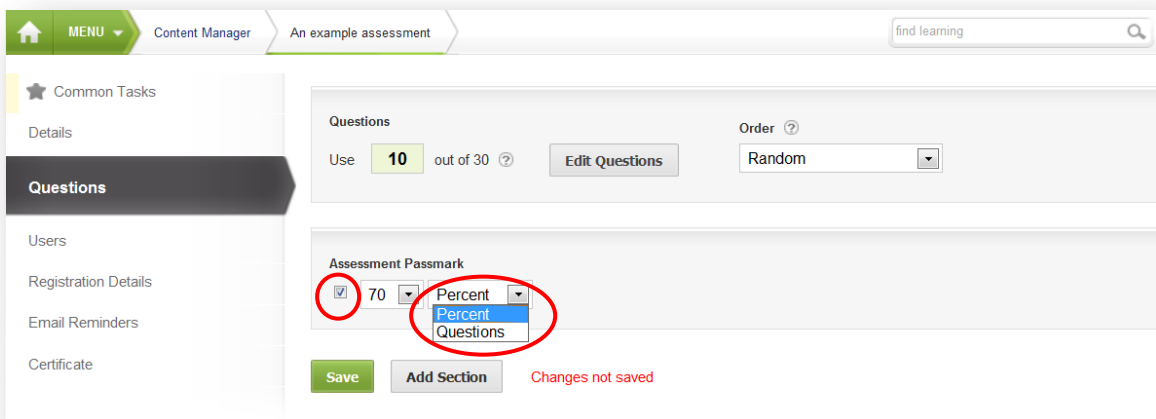
Tip: to make your assessments more robust it is a good idea to select more questions than you need when creating them. The question banks are regularly reviewed and updated, so if any of your selected questions are removed from the bank, your assessment is less likely to break because it will draw another question from your selected pool of questions to replace it.



If you decide that you want more, less or different questions, select **Edit Questions**. This will take you back to the previous page. All the questions you have selected will have an 'x' next to them. You can remove any question you don't want by selecting the 'x'. If you want to add more questions select **Add More Questions**. All the questions you have already chosen will disappear from the screen but they will still be in your 'selection basket'. You can then either select the appropriate category or use the **Search Questions** box to find additional questions. When you have all the questions you want, select **Add Questions** and you will find that the displayed number of questions will reflect the number of questions you have added.



For example, if you had 6 questions and added three more, the total number of questions will be 9; the display under the word Questions will say, 'use ...out of 9.



If you wish to set a passmark, you can do so by selecting the tick box under **Assessment Passmark** and then setting either a percentage or number of questions which the participant must answer correctly in order to qualify for a pass.

If you want to add an additional section to your assessment, select **Add Section** and then click on the green **Add Questions** button that appears as illustrated below.



Assessment Passmark

70  Percent  Percent  Questions

Changes not saved

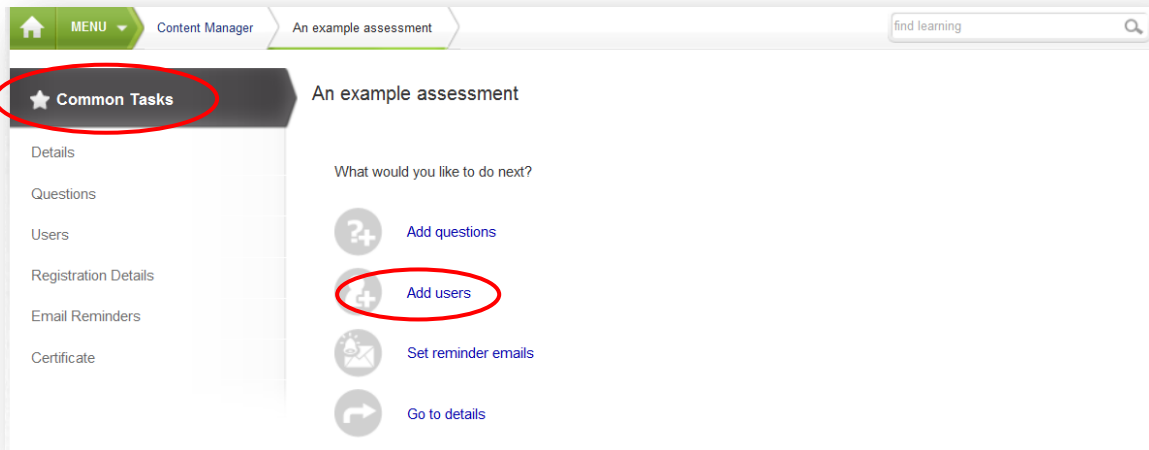
Section Name	Questions	Passmark	Actions
<input type="text" value="New Section"/>	10 out of 30 <input type="text"/>	<input type="text"/> 70 <input type="text"/> Percent <input type="text"/>	<input type="button" value="Edit Questions"/> <input type="button" value="X"/>
<input type="text" value="New Section 2"/>	No questions	<input type="text"/> 70 <input type="text"/> Percent <input type="text"/>	<input type="button" value="Add Questions"/> <input type="button" value="X"/>

Additional sections can be added thereafter by clicking on the green **Add Section** button which appears in the top right hand corner of the screen.

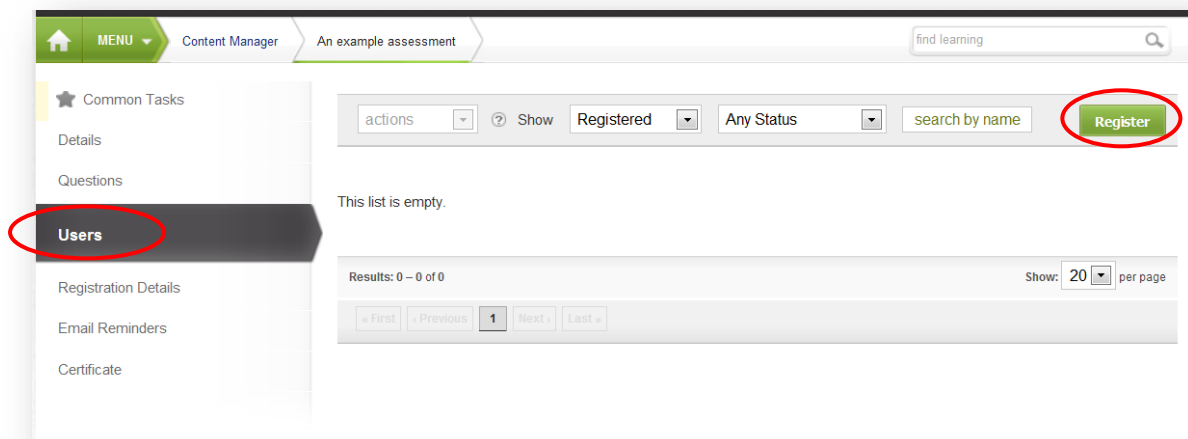
Once you are happy with your question options, select **Save**.

## 3.2 Add users

You can register staff on to an assessment by selecting **Common Tasks** at the top of the Menu on the left hand side of the page then select **Add Users** from the central menu.



Another way to add users is to select **Users** in the left hand menu, then select **Register**

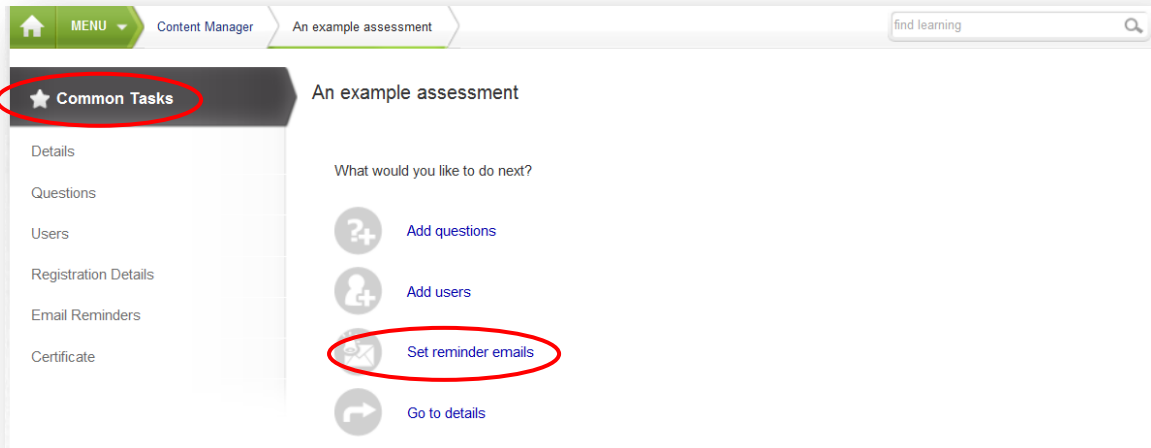


Please now see **2.1.1 Adding Users** under **Content Manager** for full instructions on registering users onto an activity.

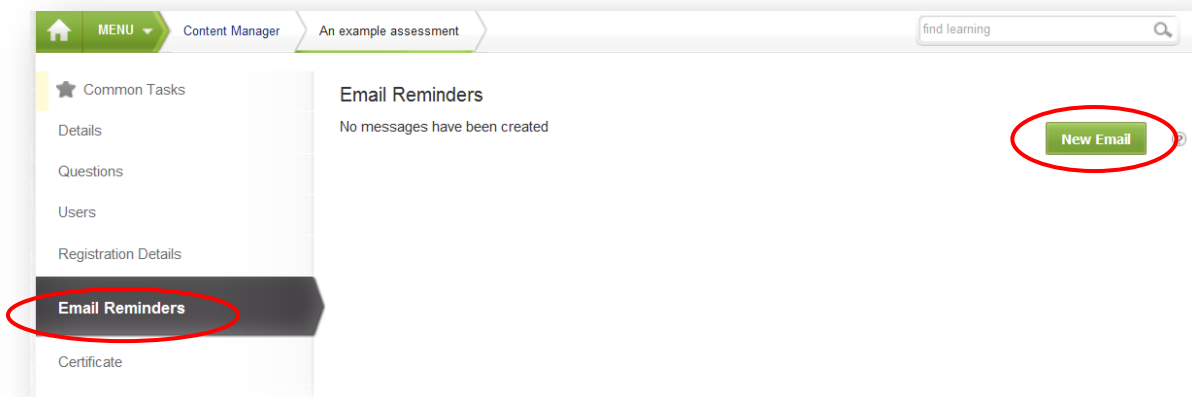
### 3.3 Set reminder emails

It is possible to send out emails in relation to an assessment (likewise, any learning activity), to a specified group of people.

Either select **Common Tasks** and then select **Set reminder emails** from the central menu.....

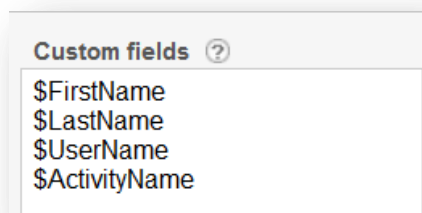


.....or select **Email Reminders** from the left hand menu and **New Email** from the top right of the screen.



Complete the fields as required. You may use the **Custom fields** options when you wish to enter variable information into the email so that, for example, the recipient name will automatically populate depending on who the email is being sent to. To select a **Custom field**, double click on the one you want to insert so that it appears in the **Message** box.

Once you have written the email message select the **Next** button to set the email rules.



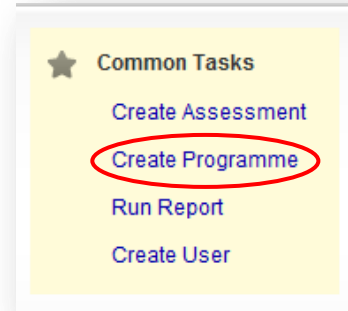
The Rules step of the wizard will determine who receives the email. Edit at least one of these options as applicable then select **Next** to choose how regularly you wish to send the email.

Once chosen, select **Finish** to save your email reminder.

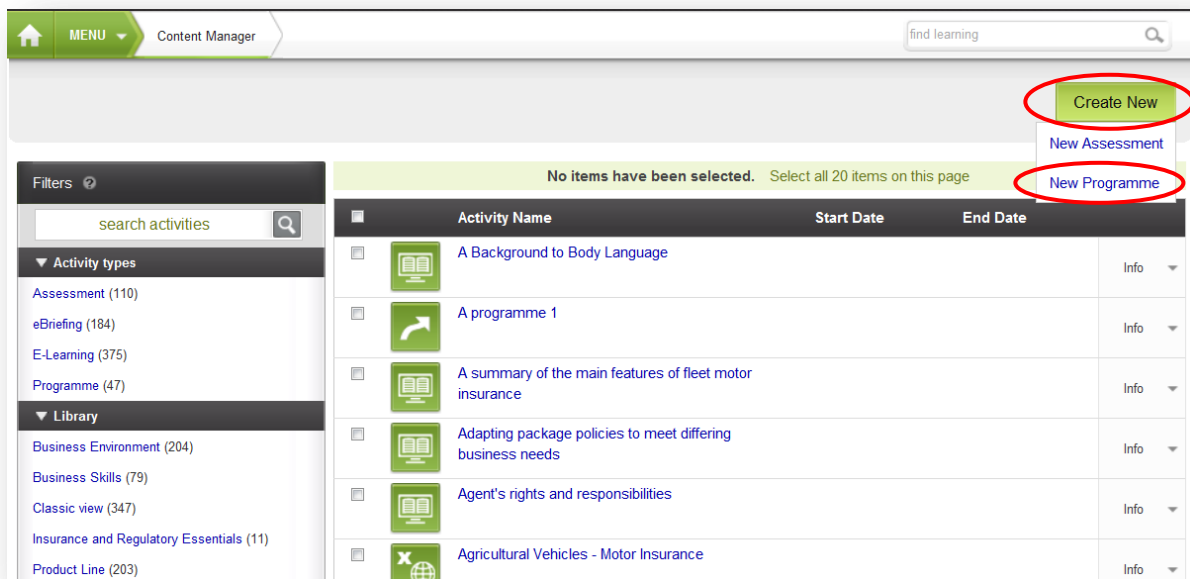
## 4 Creating a programme

A programme is a combination of learning material (reference, learning [interactive], case study) and assessments

You can create a new programme by going into the dropdown **Menu** next to the Home icon in the top left of all pages and selecting **Create Programme** under **Common Tasks**.

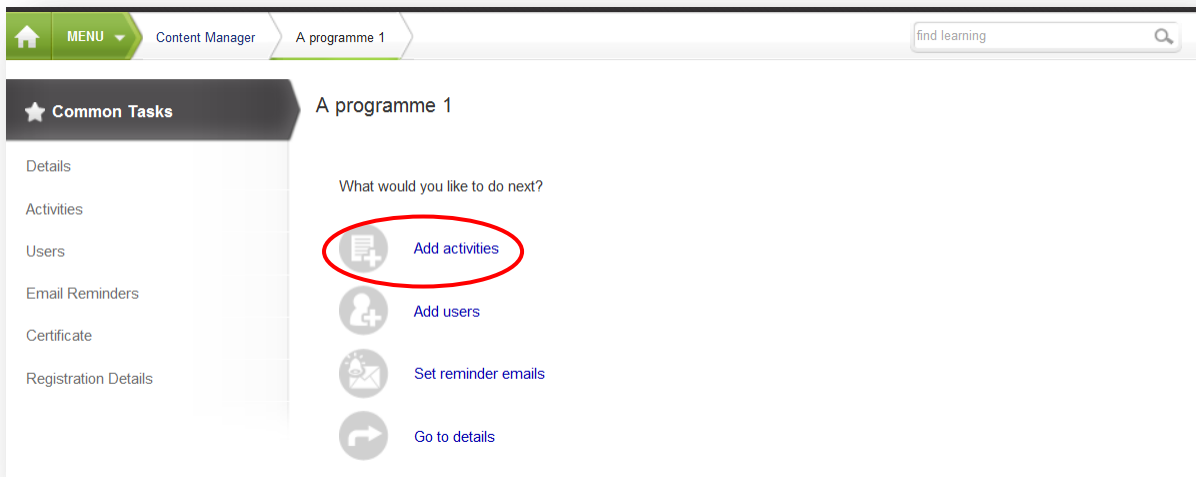


Alternatively select **Content Manager** from this same menu and hover over the green **Create New** button at the top right of the page and select **New Programme**. Type a name for the programme in the **Name** field then select **Create Programme**.

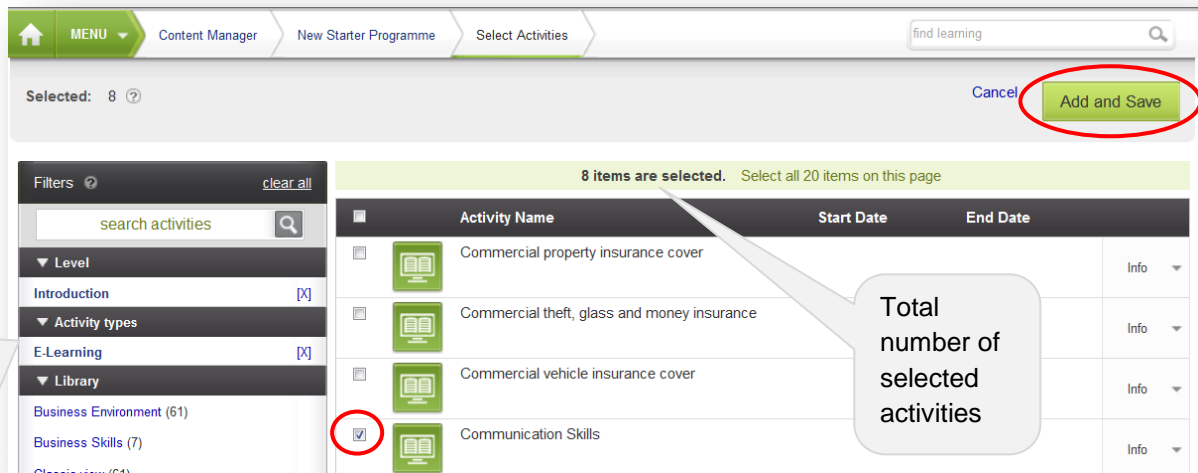


You can now add a number of learning activities to your programme and, as when creating a new assessment (see section 3 above), you can also register users and set email reminders.

You can either select the task you wish to perform from the **Common Tasks** menu in the centre of the page or select the appropriate option from the left hand menu.

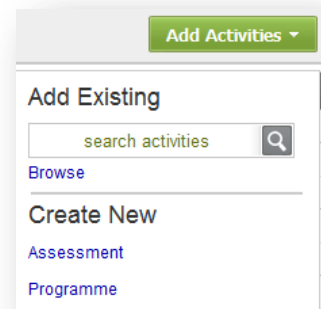


To add activities, select the **Add activities** link from the central menu. Use the filters and/or search box on the left hand side to get the categories of activities you want and then select the activities you wish to include by placing a tick in the check box next to each activity. Notice that the number of items you have selected will appear at the top of the list of activities. Once you have chosen your activities, select the **Add and Save** button in the top and bottom right of the page.



You will then be returned to the Activities page where you will see your selected activities are now listed. You can add additional activities to the programme at any time by selecting **Add Activities** in the top right corner, which will present you with a menu allowing you to **Add Existing** activities or **Create New** ones.

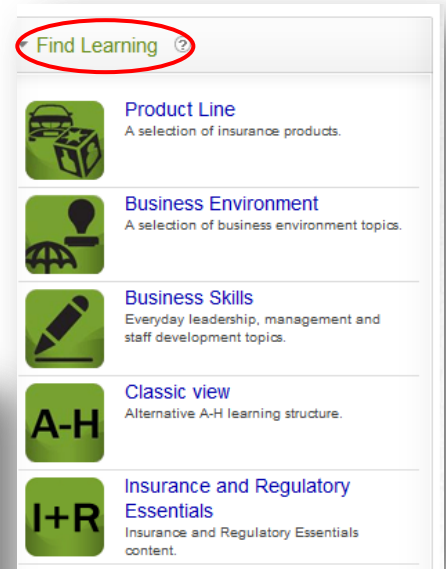
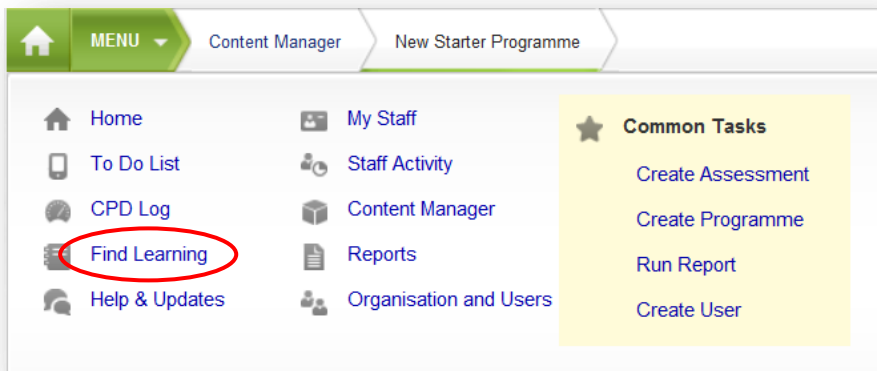
If you search existing activities, either by typing the name of a specific activity into the search box or by clicking on the **Browse** link, you will be returned to the screen shown above where you can select more activities which will be added to your original selection when you click on the green **Add and Save** button.



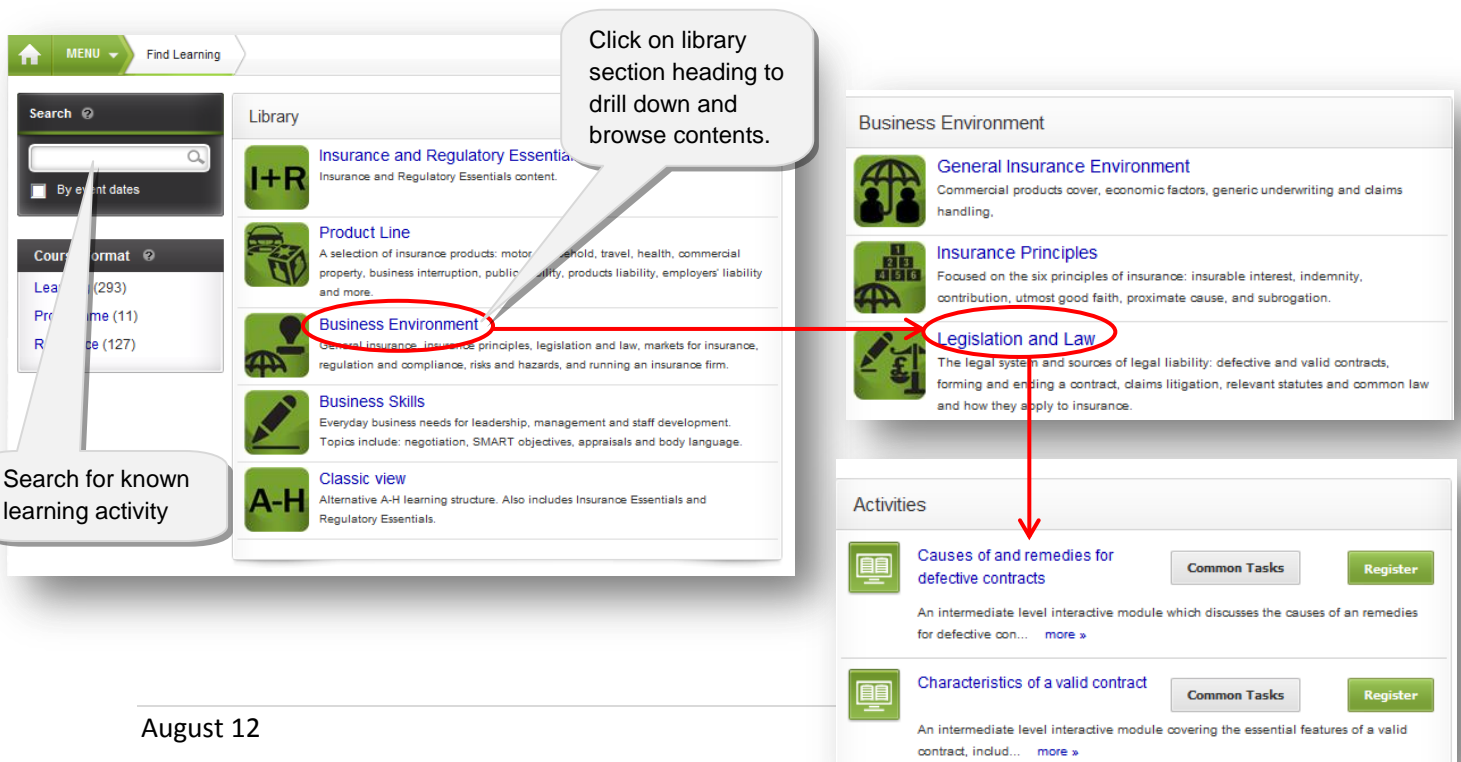
If you select to create a new **Assessment** or **Programme**, you will need to follow the steps referred to previously within this document under each of these tasks i.e. section **3 Creating Assessments** and section **4 Creating Programmes**.

## 5 Find learning activities

The **Find Learning** area of the system is primarily designed to enable staff to search for and register onto the available learning activities, however for those with the Administrator or Manager role It also provides a simple a way of allocating learning activities to your staff. It can be located either via the **Find Learning** link within the **Menu**, or by clicking on the **Find Learning** portlet heading.



When you first access the **Find Learning** area of the system you will be presented with a list of library section headings or categories, within which all the available content can be found. You can either click on a section heading to drill down to a particular learning activity within it, or, if you know the name of the learning activity on which you wish to register your staff, you can search for this by using the search box on the left hand side.



Once you have located the required learning activity, click on the **Common Tasks** link to access the **Common Tasks** page and the associated functionality as outlined in sections **2.1 Allocate Learning** and **3.3 Set reminder emails**.

## 6 Reports

Select the **Reports** link under the **Menu** or select **Run Report** from **Common Tasks** in the menu or from the top right menu on the home page.



You can run reports on activity within the system. For example a report can show how many attempts have been made on a particular assessment or to show what activities have been completed.

Reports can also be scheduled to run automatically and emailed to you or other people.

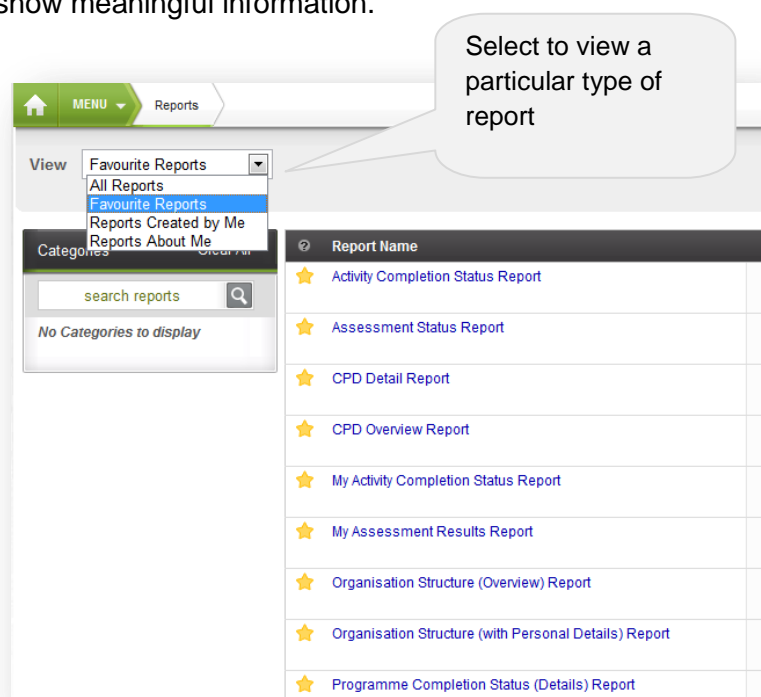
The reports can also be exported in a number of formats for use outside of bA including CSV, Excel and PDF.

The reports will only show user data you are permitted to see. You will need to start using the system in order for the reports to show meaningful information.

### 6.1 Run a report

From here you will have access to a default suite of pre-configured reports which you can run at any time by clicking on the report name.

All reports are displayed by default (10 per page, although you can change this) but you can filter the view to display a particular classification of report by selecting the appropriate view from the **View** drop down menu.



Clicking on the report name will launch the report and give you access to a further set of filters which can be used to further sort the data as required. Taking the **My Activity Completion Status Report** below as an example, you are able to filter the data by **Activity Name**, **Activity Type** and **Completion Status**.

Having entered the required filter information you will need to click **Run Report** to regenerate the report with the filtered data.

Complete any filters (if applicable) as required.

Activity Name:

Completion Status:

Activity Type:

Note: Report only shows first 1000 records. Click Export to CSV to download all records. ?

1 of 6 | Export to the selected format | Export

### My Activity Completion Status Report

First Name	Last Name	Email	Activity Name	Activity Type	Registration Status
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	0 Assessment	Assessment	Registered
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	00 Programme	Programme	Registered
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	1.1 The UK financial services industry in its European and global context	Programme	Registered
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	1.2.5.6 test ebriefing for testing against routemaps test number one 123test	Course	Registered
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	2.1.1 The characteristics	Programme	Registered
<a href="#">System</a>	<a href="#">Admin</a>	noreply@skillsserve.com	2.1.1 The characteristics	Course	Registered

Change or complete any required filters before re-running the report

Clicking on an individual's first or last name will take you to their **Profile**, which will launch in a separate tab enabling you to easily return to the Report page.

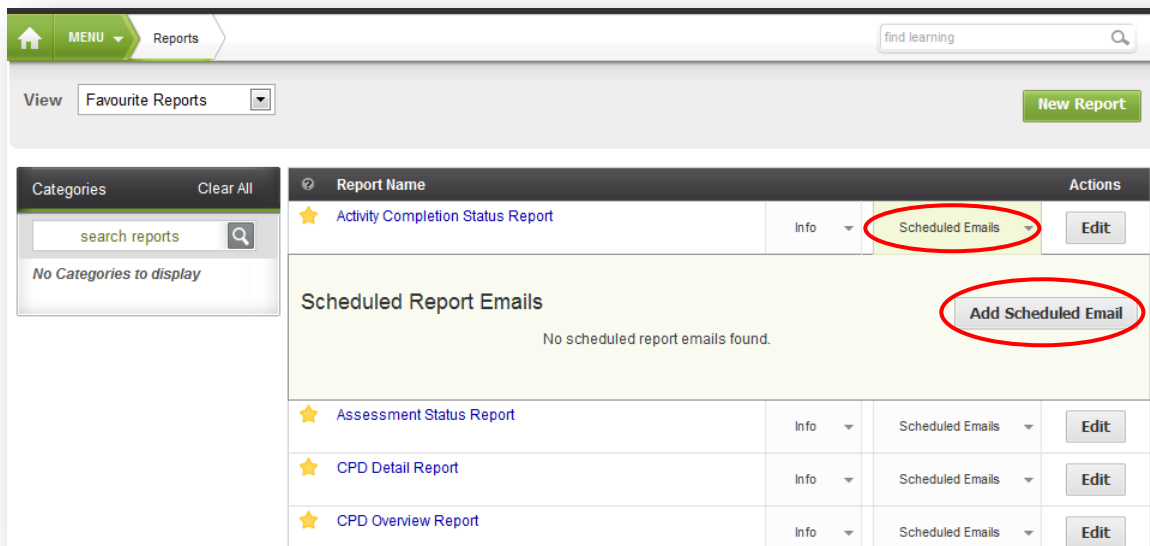
Once you have run the report you can choose to export a copy of the report using the formats in the drop down menu or you can print a copy of it.

### 6.2 Schedule a report

It is possible to schedule a report to run and be emailed to yourself or another member of staff on a set date and time.

To set up a scheduled email for a report, on the Reports home page, select the **Schedule Emails** option which appears to the right of the Reports in the table.





Then select the **Add Scheduled Email** button to start the three step wizard.

### 6.2.1 Step one

On the first step of the wizard you are required to select the filters for the report. These will vary depending on what filters have been requested when creating the report. Once you have chosen the filters, select **Next** to go to the second step of the wizard.

### 6.2.2 Step two

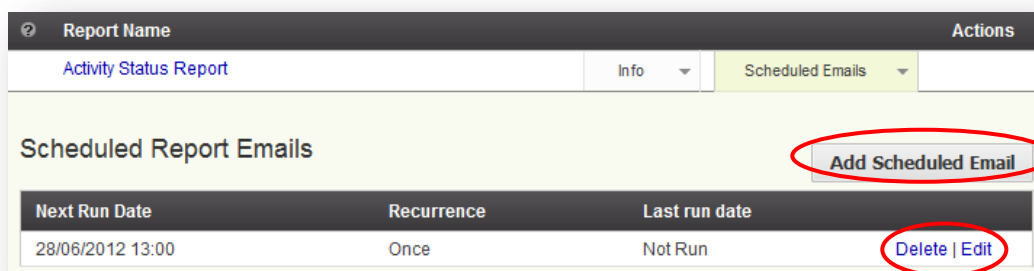
In step two of the wizard, you are required to choose the recipients of the emailed report. Your own details will be selected by default and you will see them in the middle of your page. If you do not wish to receive the emailed report, uncheck the box next to your name.

Use the **Filter** and **Unit** search fields on the right to locate and then select the recipients. As you select the names of the recipients they will appear in the middle of your screen. Once you have chosen all the recipients, select **Next** to go to the third and final step of the wizard.

### 6.2.3 Step three

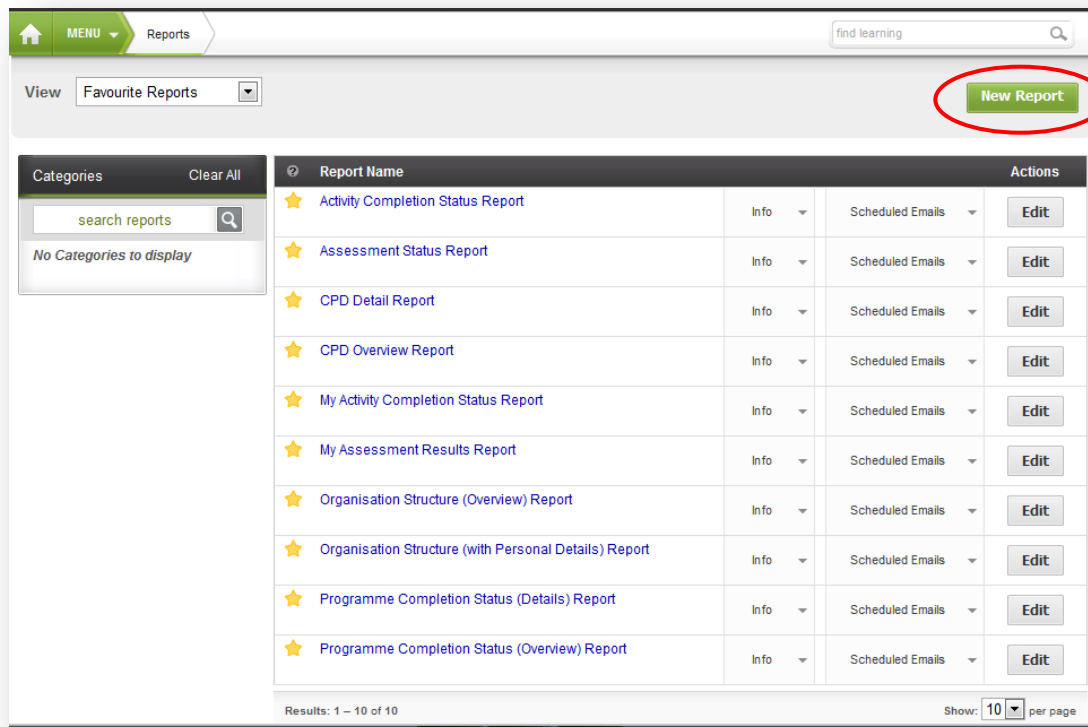
In the final step of the wizard you can select how frequently you wish to run the report. You can set it up for a one off date in the future or you can set it to run on a regular basis starting from a set date and time. Once you have chosen the schedule for your email, select **Finish**.

To view the details of your scheduled email, select the **Scheduled Emails** option to the right of your report. You should now see the next run date, the recurrence and the last run date of your scheduled report. You can use the **Delete** and **Edit** links from within this section at any time should you wish to delete or edit your scheduled report email.

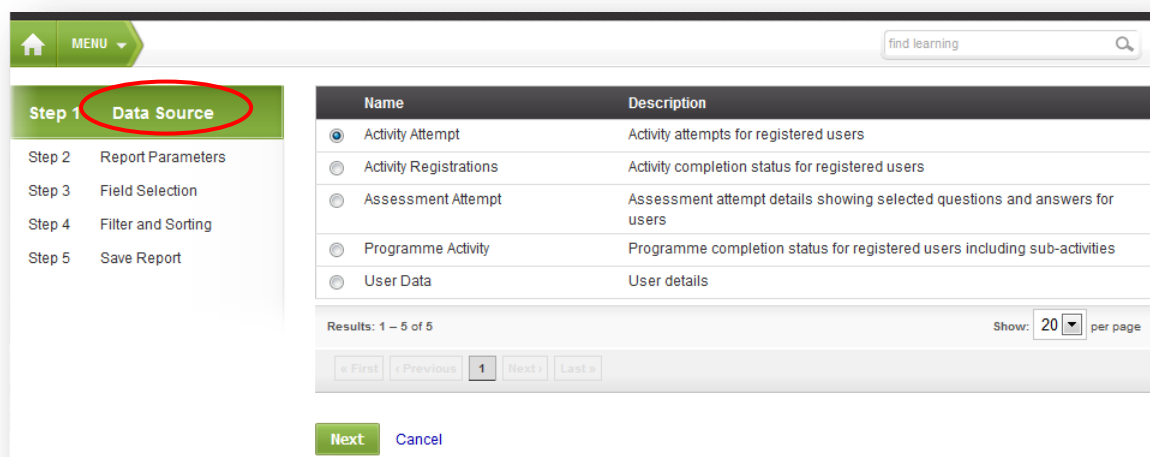



### 6.3 Create a new report

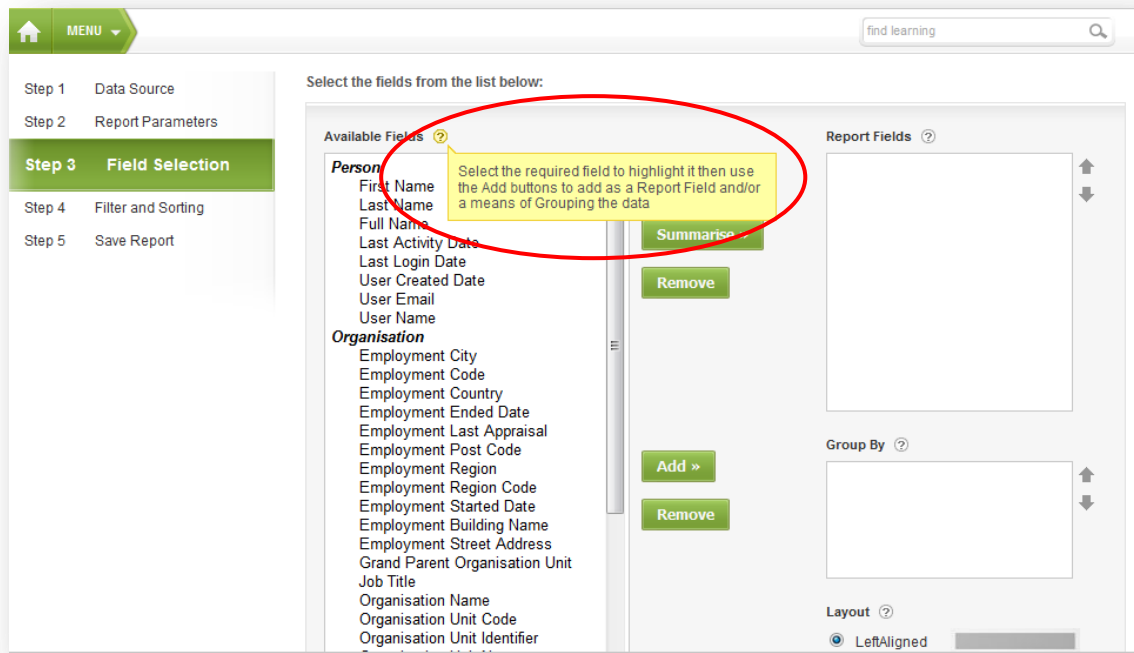
Select **New Report** on the Reports Home page.



You will then need to complete the 5 step Wizard, step 1 of which is illustrated below and requires you to select the **Data Source** for the report, in other words, the type of data you wish to include within your report.



Progress through the remaining steps of the wizard, where necessary hovering over the  icons for helpful information on completing the report creation process.



Your report can be launched upon completion of the fifth and final step of the wizard.