Getting the most from Aptem

A guide for administrators

[Apprenticeship and Training Providers]

Aptem introduction

We originally developed Aptem™ because we recognised that most people would benefit from job-search assistance, especially in tough economic times when there is considerable competition for vacancies. When advisors deliver assistance there is a salary underpinning every hour of delivery and this means that it is expensive help to offer and is often rationed. We recognised that a technology platform could be made available at far lower cost and would have the benefits of being accessible 24/7 and from any location with an Internet connected computer. That was in 2009 and since then Aptem has been continuously developed and improved to deliver online courses, manage contacts with employers and placements, ePorfolios and manage apprenticeships.

We offer Aptem to several different sectors and there are a number of features that have been added due to sector specific needs. For example, training providers that want content and ePortfolio for funded employability qualifications or those working with the unemployed who need Universal Jobmatch integration.

Please note. According to the sector, those being assisted may be referred to as jobseekers, learners, customers, clients, residents, students or apprentices. For simplicity, in this manual we mainly use the term 'user'.

This manual describes the various features and how to use them. If anything is unclear, please do call the Aptem support line on 020 7870 1000.

An Overview of Aptem

Aptem is a flexible technology platform which offers a range of features used by organisations to manage apprenticeships, employability study programmes, job search assistance and outplacement. We offer Aptem to several different sectors and the features enabled in your administrator account will reflect the needs and service delivery model of your organisation.

As an administrator you will be able to monitor the Aptem activity and progress of the users (e.g. learners, students, apprentices, job seekers) assigned to you within your organisation's Aptem account.

Typically users are enrolled on a 'programme' which reflects their needs and requirements. For each programme only the Aptem tools and features that are relevant will be enabled for users and administrators. An account can contain more than one programme to reflect the needs of differing groups.

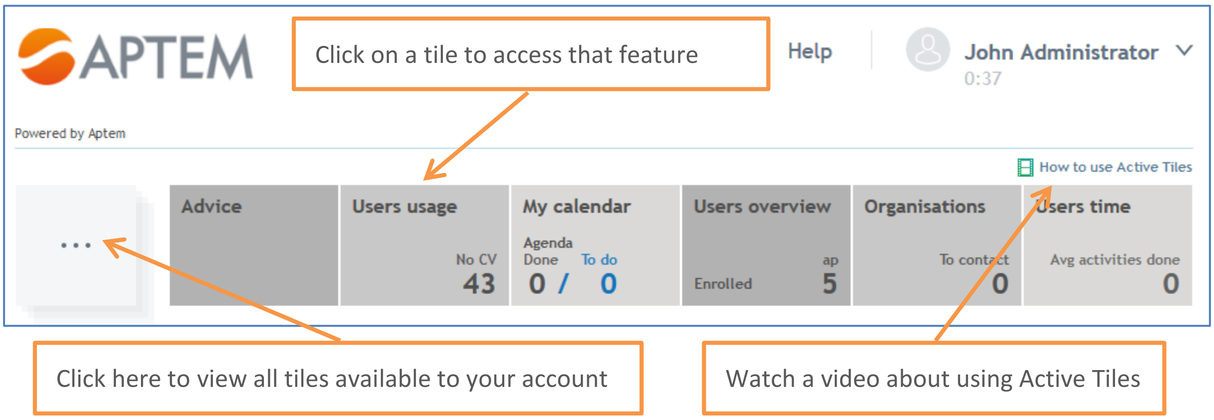
The guide explains the main features used by administrators who are directly supporting users in reaching their training and employment goals. Aptem accounts and programmes may contain the following features:

- Automated wizards for the collection of user's data for the purpose of funding, ILR or programme assignment
- Delivery of online courses through Aptem
- Aptem Collaboration Centre™ for messaging and notifications of user activity
- Learning plans for the delivery and monitoring of blended learning
- Employer and Organisation contact management
- Work placement management and application system
- Job search tools and job application tracking
- Tracking of milestones and outcomes, for example for training, job search or funding.

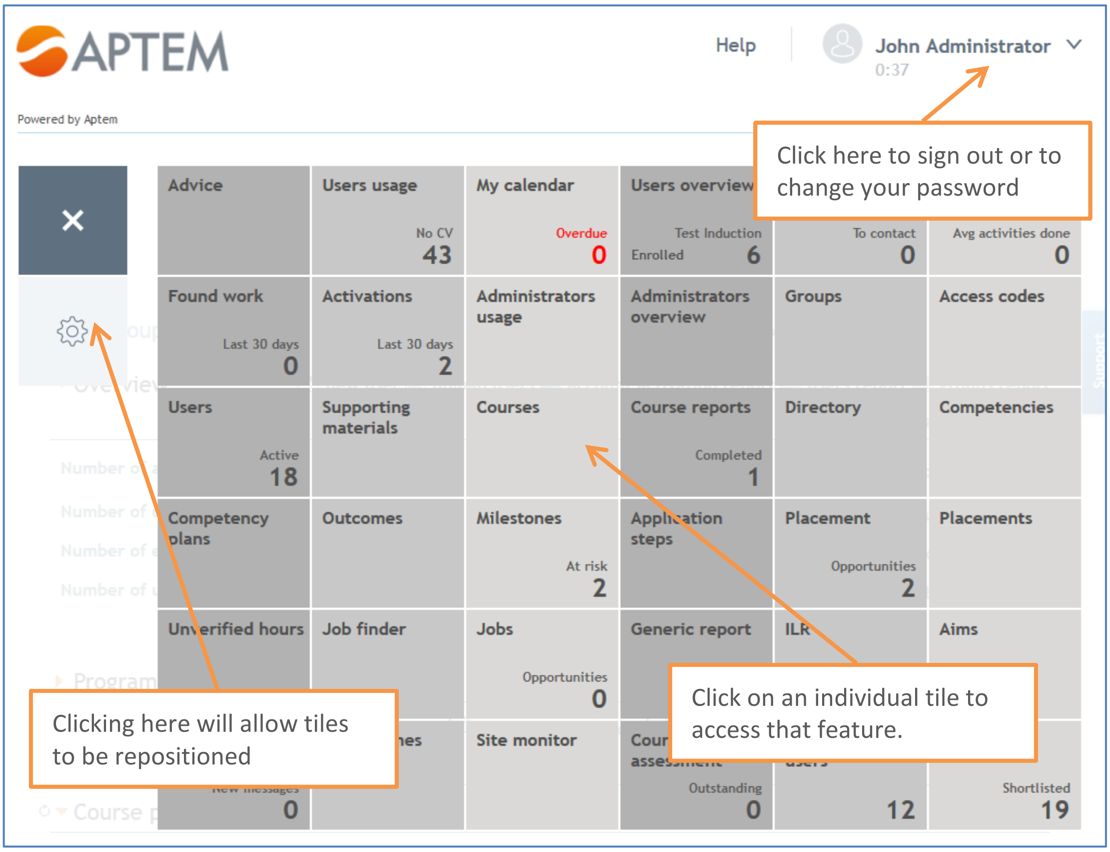
There is a supplemental guide detailing additional administrator features which are used to tailor Aptem to meet your organisation's needs. These are available by contacting the Aptem support team on 020 7870 1000.

The Administrator Portal

When you log into your Administrator account you will see a navigation panel containing 'tiles' near the top of screen. The current status of key tasks and functions are displayed in the *tiles*. There is a tile for each function within the system. Each tile can be clicked upon to access the relevant function or report details.



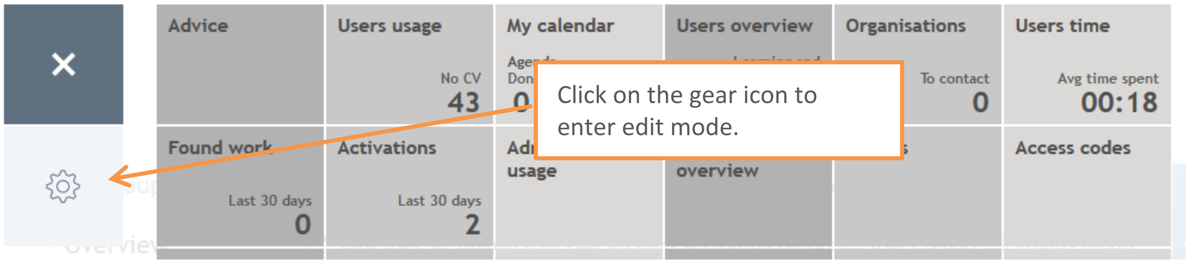
By default only the first line of tiles is displayed. Clicking on the ··· expand icon will display all available tiles and thus functions enabled in your account. The number of tiles displayed will depend on which features you have access to.



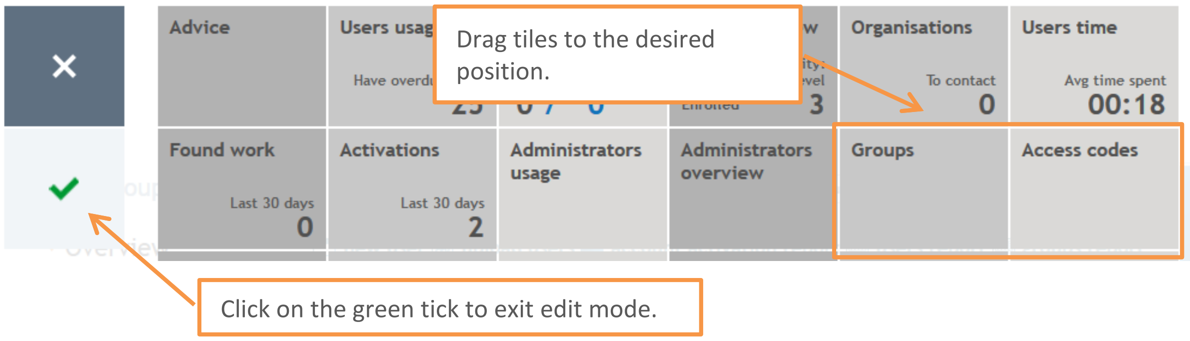
The position of the tiles is fixed, each tile will always be presented in the same position within the navigation panel. Thus the same six tiles will always be displayed in the top row.

There is an option to alter the position of the tiles, for example, if you wish to display particular tiles in the top row for quick access without needing to expand the whole navigation panel.

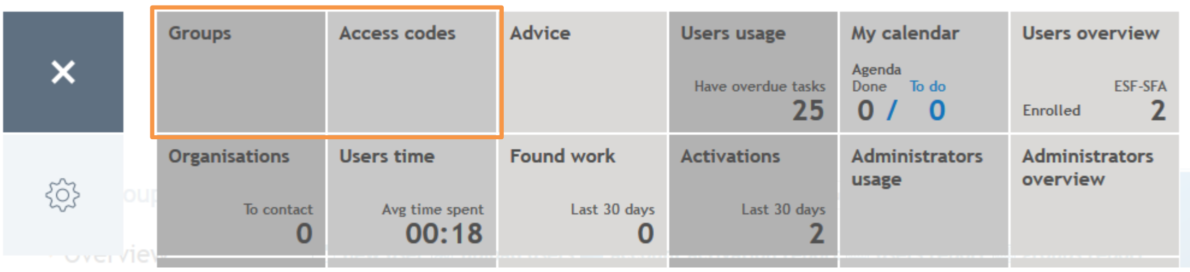
1. Click on the ‘cog’ icon to activate edit mode. The ‘cog’ will change to a green tick.



2. With the green tick visible, drag tiles to their new position. We recommend moving the tiles you find most useful to the top row. Note that the shading of each tile depends on which column it is placed in the navigation panel.



3. Once the tiles have been placed in the desired position click on the green tick to exit edit mode. The gear icon should be visible. The tiles will be displayed in their new positions each time you use your account, unless you decide to amend their positions.

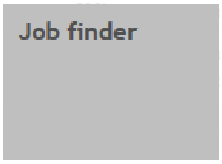
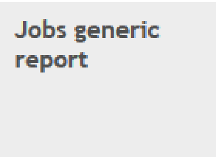
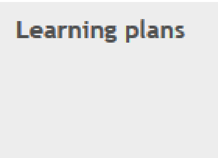
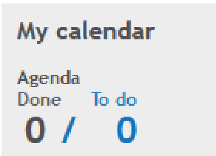
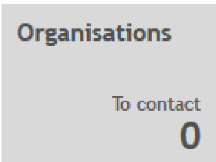
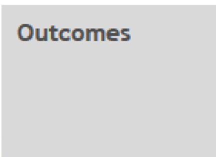


Administrator navigation tiles

This section provides an explanation of each tile (in alphabetical order) within an administrator's navigation panel. The background shading of a tile depends on which column it is located in your navigation panel as well as the theme applied to your account. The position of individual tiles can be changed – see previous page. *Remember, not all of the following tiles may be visible in your account it will depend on which features have been enabled*.

Tile	Tile Name	Purpose
Access codes	Access codes	Displays a list of access codes and if enabled the option to create more. See section Managing access codes
Activations Last 30 days 17	Activations	Displays a report showing how many accounts have been activated. See section Monitoring usage of Aptem by users
Administrators overview	Administrators overview	Displays the administrators profile page for all administrators in your account. See section Administrator Group Profile
Administrators usage	Administrators usage	Displays the administrators' activity and usage report. See section Administrator Usage Report
Advice	Advice	Allows access to the advice centre.
Aims	Aims	Create and edit aims that are linked to ILRs. See section Adding and editing qualification Aims
Application steps	Application steps	Allows the editing of the application process for a work placement. See section Creating a default application process

Candidates Shortlisted 17	Candidates	Displays a list of candidates who have applied to placements. See section How to review and respond to work placement applications
Collaboration centre New messages 0	Collaboration centre	Send messages to Aptem users and receive notifications of evidence submissions. See section Using the Aptem Collaboration Centre
Course assessment Outstanding 1	Course assessment	View coursework that are awaiting assessment or completed assessments (e.g. for moderation). See section Reviewing and approving user assignments
Course reports Completed 4	Course reports	View course reports for each user showing submitted evidence and their progress against course criteria. See section Unit sign-off documents and Course Reports
Courses	Courses	Displays a list of the courses in your account. Also, if enabled, provides access to the course builder for creating new courses and learning materials. See section Managing courses and assessing employability units
Directory	Directory	Displays a searchable directory of recruitment agencies, local employers and newspapers.
Found work Last 30 days 0	Found work	Displays report of those users who have notified that they have found work. See section Monitoring usage of Aptem by users
Groups	Groups	If enabled allows editing of the group structure within the account. Managing groups within your account
ILR	ILR	Review, amend and verify Individualised Learner Records (ILRs) for users. See section Individual Learner Records (ILR)

	Job finder	Displays the vacancy research tool. See section Researching job vacancies
	Jobs	Manage jobs, apprenticeships and opportunities from partners and prospects. Users in your account can search for these jobs within Job Finder. See section Managed Jobs System
	Jobs generic report	Access a wizard to create custom reports on managed jobs' details and status. These reports can be saved as templates. See section Custom job reports and data export
	Learning plans	Review progress against learning plans and view detailed progress reports. See section Monitoring user progress on learning plans
	Milestones	Displays a report of Aptem user milestones, as defined within a programme. See Recording milestones for funding purposes
	My calendar	Displays the administrator's calendar/task list which might contain placement interviews, contact meetings etc.
	Organisations	Accesses the Organisations report to view, edit or add new employer, prospects or partner organisations. See section Employer/Organisation Management System
	Organisations generic report	Access a wizard to create custom reports on organisations' details and status. These reports can be saved as templates. See Custom organisation reports and data export
	Outcomes	Displays a report of Aptem user outcomes as defined within a programme. See section Monitoring outcomes within your account

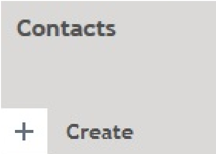
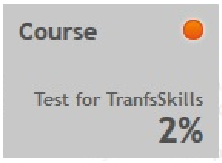
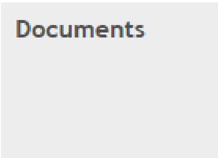
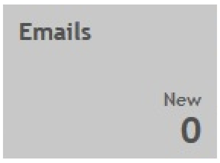
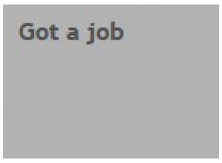
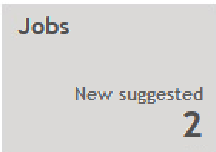
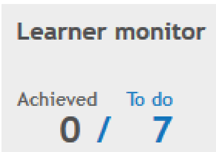
Placements/ Workshops Opportunities 0	Placements	Allows the creation and editing of workshops or learning placements. See section Creating and Editing Placements
Placements/ Workshops users	Placements / Workshop users	Displays a list of Aptem users who have been allocated to a placement or workshop. See section Viewing a list of users allocated to a work placement
Programmes	Programmes	Review and edit programmes within your organisation account. See section Programme Manager – an overview
Signatures Required signatures 0	Signatures	Displays a report of compliance documents that require an electronic signature from users, employers and/or administrators. See section Managing e-signatures and compliance documents
Site monitor	Site monitor	Monitor changes on specific webpages such as when new jobs are added to jobs and careers pages from local companies.
Supporting materials	Supporting materials	Download or print supporting materials for default courses within Aptem.
Unallocated users 0	Unallocated users	Displays a list of Aptem users who have not been assigned to a work placement. See section Finding users who have not completed a placement
Unverified hours 0	Unverified hours	Reports on timecards recorded for each user and placement. Administrators can verify timecards from this page. See section Checking unverified time on a work placement
Users Invited 3	Users	Displays the User report – a list of all user accounts and their status. Very useful for checking details on a particular individual. See section Users Report

Users generic report	User generic report	Access the report wizard to create custom reports on users' details and progress. These reports can be saved as templates. See section Creating custom user reports (User Generic Report)
Users overview Recruitment Programme [Mark] Enrolled 0	Users overview	Displays the Group profile page for all Aptem users in your account. See section Users Group Profile
Users time Avg activities done 0	Users time	Displays the activity report for all Aptem users in your account. See section Monitoring usage of Aptem by users
Users usage Have overdue tasks 4	Users usage	Displays the User usage report showing how users have been using Aptem. See section Monitoring usage of Aptem by users

Aptem user navigation tiles

For reference this section lists, in alphabetical order, each navigation tile that might be available to Aptem users depending on the features enabled for each individual.

Tile	Tile Name	Purpose
Action plans Overdue 0	Action plans	Create SMART action plans
Advice Read Available 2 / 337	Advice	Allows access to the advice centre.
Applications + Log applicati...	Applications	Track progress of vacancies in Job Finder user has applied to.
Collaboration Evidence Approved Rejected 0 / 0	Collaboration	Send messages and evidence to your case owner. See section Users provide evidence for their learning plan

	Contacts	Aptem user can record important job search and networking contacts. Contacts can be imported from Facebook, Twitter and LinkedIn.
	Course	Allows user to return to the current course they are completing.
	CVs	Create, edit, and export CVs. Aptem users can also import existing CVs.
	Directory	Displays a searchable directory of recruitment agencies, local employers and newspapers.
	Documents	Displays a list of documents, such as compliance documentation, action plans, course reports etc. created within Aptem. See section Monitoring signatures for users and learners
	Emails	Aptem user can integrate a Gmail or outlook.com email account with Aptem.
	Got a job	Notify that Aptem user has gained employment.
	Jobs	Access to Job Finder to search for jobs and view suggested jobs. See section How can a user respond to a 'Suggested Job' in their Aptem account?
	Learner Monitor	Allows user to self-rate against competencies e.g. to demonstrate employability skills. See section How can a user self-assess against a competency

Learning plan Progress 0%	Learning plan	User can view their progress against their blended learning plan. See section Using the Learning Plan to track blended learning
My information library	My information library	A store of useful information for completing application forms such as work experience, qualifications, skills and work interests.
Onboarding wizard	Onboarding wizard	Allows the user to provide start of programme information, some of which may be required for compliance documents e.g. ILRs. See section The user journey using the Onboarding Wizard
Placements Applications pending 0	Placements	Allows the user to search and apply for work placements provided by a college or training provider (as opposed to jobs). See section How can a user search and apply for a work placement?
Site monitor Updates 0	Site monitor	Monitor changes on specific webpages such as when new jobs are added to jobs and careers pages from local companies.
Tasks Agenda Done To do 0 / 0	Tasks	List of tasks viewable in either list or calendar format. Tasks can be created by the Aptem user, by an administrator or automatically by a programme or work placement entries. See section The user records their time on the placement
Templates + Create	Templates	A library of template for job and training applications, prospective emails and networking requests. Aptem users can edit the default templates or write their own.
Work placement wizard	Work placement wizard	Allows user to complete the work placement wizard to support job and learning placements. See section The user journey using the Work Placement Wizard

Frequently asked questions

How do I enrol a user onto a course within Aptem?

If a user is not currently assigned to a course then the person can be enrolled onto any course available to your account. Refer to the section Enrolling users on a course.

How do I move a user from one group to another?

Transferring a user from one group to another within your organisation's account is a function available to administrators responsible for managing an account. Refer to the section Moving users between groups.

How do I add a colleague as an administrator?

This feature is not enabled for all administrator accounts. However the process is similar to inviting a user to activate an Aptem account. Refer to the section Creating a new administrator.

How do I add a colleague so they can assess course assignments?

This feature is not enabled for all administrator accounts. However the process is similar to inviting a user to activate an Aptem account. Refer to the section Creating a new administrator

What can I do if a user has changed their email address and cannot remember their username?

If a user no longer has access to the email address they used to register with Aptem then their contact details can be edited – refer to the section Users Report. The user can then use the username recovery link on the login page.

Aptem recommends only changing contact details when they are from an authenticated source.

How do I find out if a user has recently used Aptem?

The usage reports and the user's individual profile report detail which features of Aptem a user has actively used. Refer to the section Monitoring usage of Aptem by users and User Profile Report for more details.

How do I find out if a user has created a CV in Aptem?

The user's individual profile report details which features of Aptem a user has actively used and will allow review and editing of a user's CV. Refer to the section User Profile Report for more details.

Can I remotely check or help edit a user's CV in Aptem?

The user's individual profile report details which features of Aptem a user has actively used and will allow review and editing of a user's CV. Refer to the section User Profile Report for more details.

How do I check a user's progress through an Aptem course?

A user's progress through a course can be checked using the course section of the Users Group Profile Report. Refer to the section Monitoring course progress.

A colleague with an advisor account has left our organisation how do I remove their account?

Refer to the section Administrator Profile Report.

How do I check if administrators have been using Aptem to support users?

The advisor usage report provides this information. Refer to the section Administrator group profile.

How can I ensure that a user is automatically enrolled onto a course within Aptem when they register their account?

A default course can be applied to a group so that any user registering a new account within that group will be automatically enrolled on the course. Refer to the section Adding/changing the default course for an existing group.

As an assessor for a course how can I view a Aptem user's assignments?

Unmarked assignments can be viewed and assessed from the Outstanding Approval page – for more details refer to Reviewing and approving user assignments. A user's current portfolio for a course can be viewed via the Course Reports page – refer to section Unit sign-off documents and Course Reports.

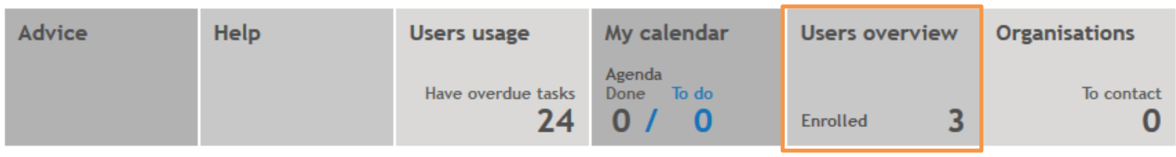
Managing Users within your account

This chapter explains how to track the number of enrolments and active subscriptions within your organisation's Aptem account. The following topics are covered:

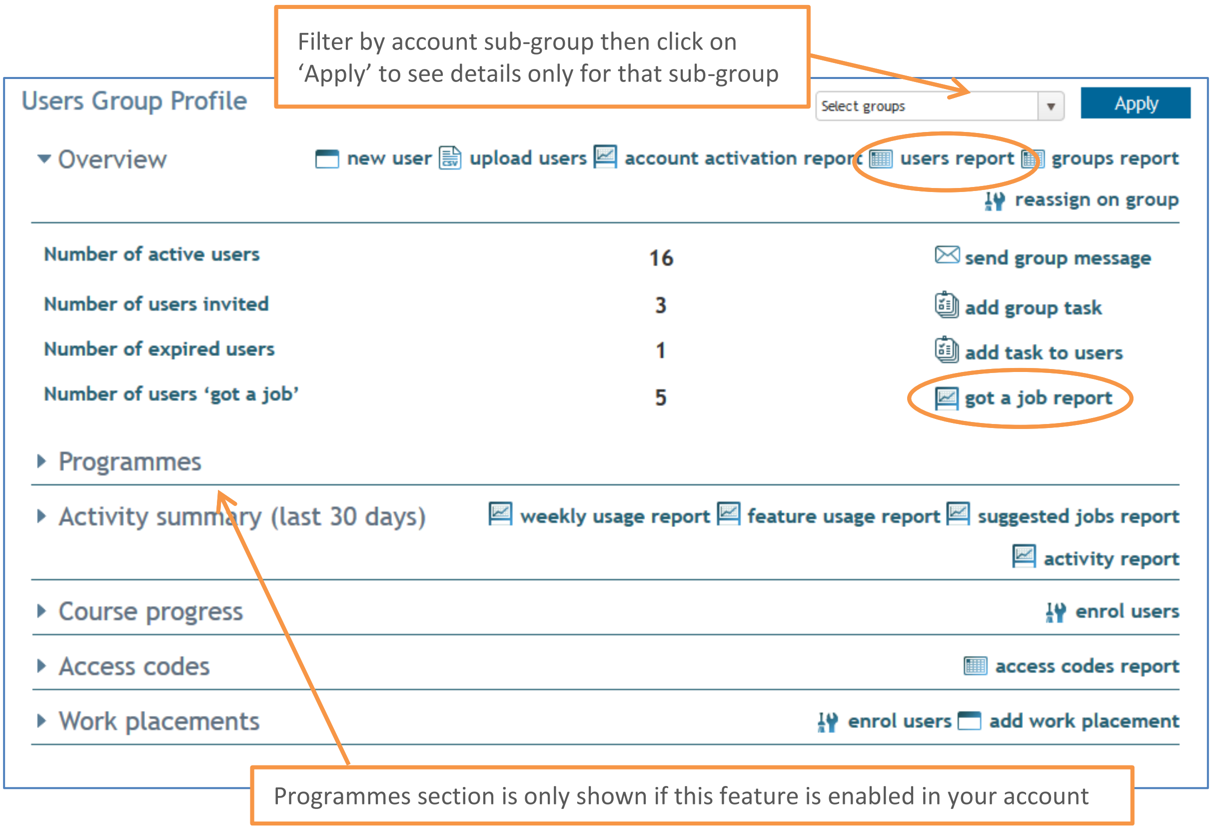
- How to display an overview of users in your account.
- How to view a list of all users in the account including expired accounts.
- How to track enrolments by date.

Users Group Profile

This section explains the Users Group Profile report, which is accessed by clicking on the Users Overview tile in the navigation panel.



1. Sign in to your administrator account.
2. In the Navigation panel click on the 'Users Overview' tile to display the Users Group Profile page.



This report gives a quick overview of users in the account with quick links to frequently used administrative tasks. The report can be filtered to show the relevant data for any subgroups within your account by using the group filter control.

Each section within the Users Group Profile can be expanded by clicking on the relevant section title. The profile page contains the following default sections:

- Overview
- Programmes (if this feature is enabled in your account)
- Activity Summary (last 30 days)
- Course Progress
- Access Codes
- Work placements (if enabled in your account)

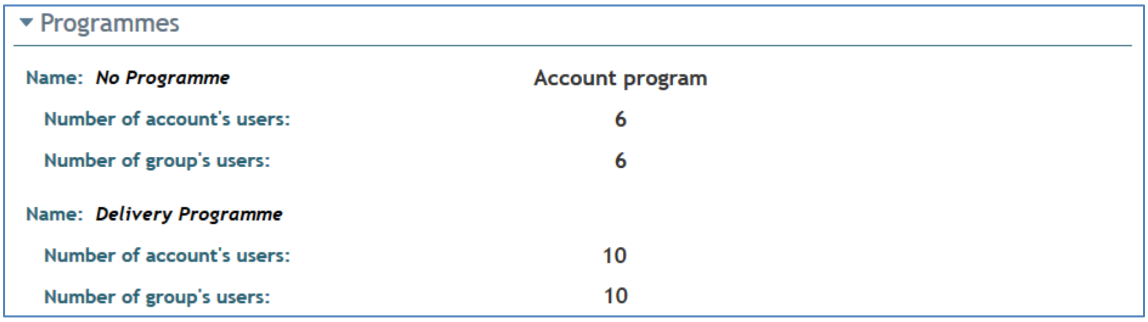
Overview Section

This section provides a count of the active and expired Aptem users in your account as well as users that have notified Aptem that they have a job or training placement.

- For information on which users have notified that they have found work, click on the "got a job report" link. See section The Got a Job report below .
- For information on users in your account click on the "Users Report" link. For more details see the Users Report section below.
- To view more details on which Aptem users who have recently activated their accounts click on the 'Account activation' link. See section Account Activation Report for more details.

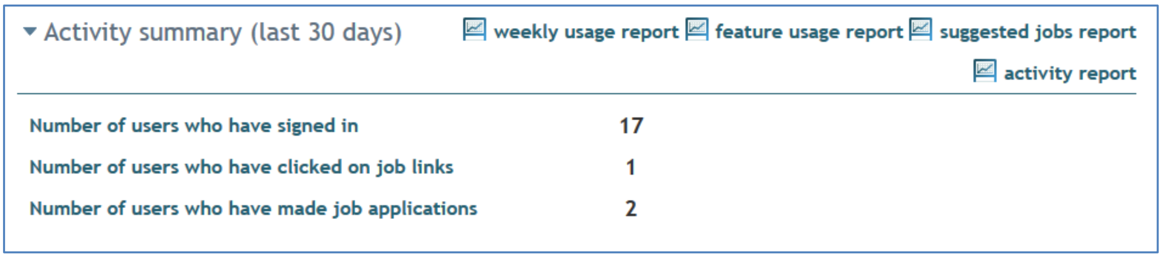
Programmes

If enabled, this section lists the number of programmes in your account and the number of Aptem users enrolled on each programme. See section Programme Manager – an overview for more information on programmes.



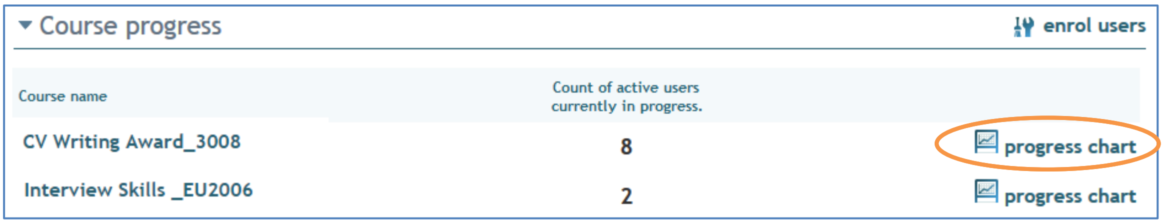
Activity Summary

This section provides a quick summary of activity during the past 30 days. For details on user usage of Aptem click on the 'feature usage report' link. See the section Monitoring usage of Aptem by users below for further explanation of the available reports.



Course Progress

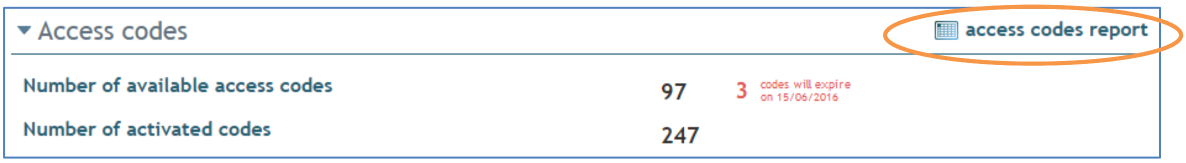
This section of the page lists the employability and foundation courses in your account, displaying the number of users currently working through each course.



Click on the progress chart links to display detailed information on which course components each user has completed. See section [The Course Progress Report](#).

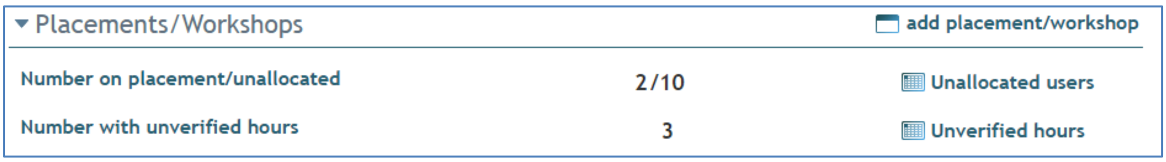
Access Codes

This section of the page shows the number of available access codes, highlighting the number of codes next due to expire. Click on the "access codes report" link to view more information on the codes within your account – see the section [Managing access codes](#) for more details.



Work placements

This section of the page shows the number of users on work placements. Click on the 'Unallocated users' link to list users who are not allocated to a work placement. For more details refer to the section [Monitoring work and training placements](#).



Users Report

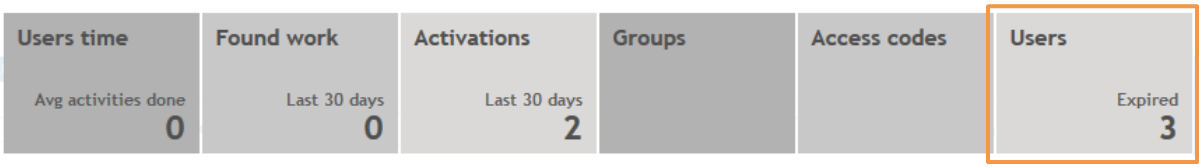
The Users Report lists all users in your account with options to update contact details, make notes and drill down to an individual's usage of Aptem.

To view the Users Report, either:

1. In the Navigation panel click on the '**Users**' tile .

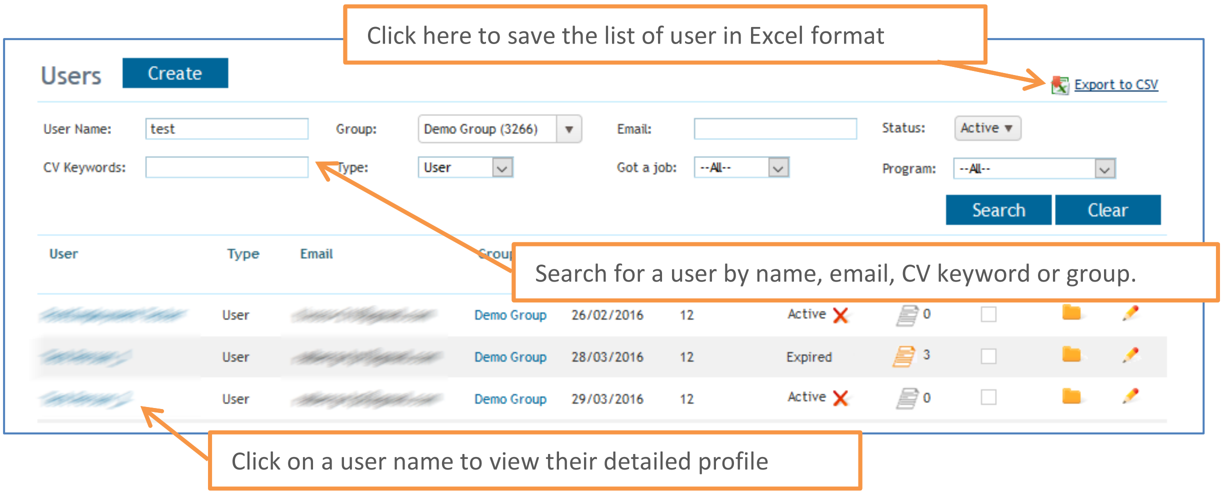
OR

- Click on the 'Users Report' link at the top of the Users Group Profile.

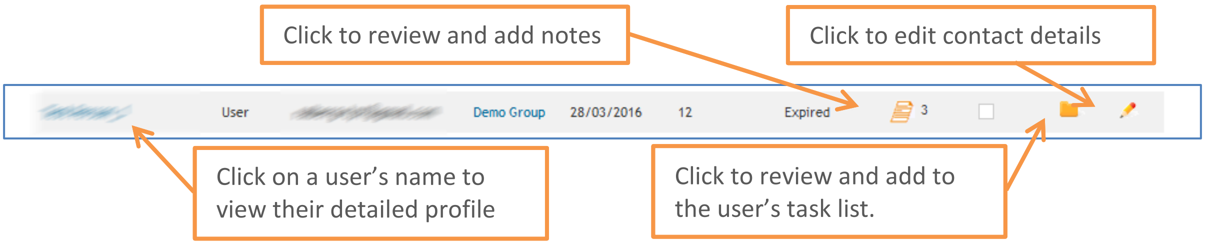


The Users Report lists all users within your account, showing their email address, allocated group, and length of subscription. It has the following features:

- *Search for a user* by name or email address. Type in the relevant boxes and click on the search button.
- Show users in a specific group using the Group filter then click on the Search button.
- Search for a list of users with a particular keyword in their CV using the Keyword search box then clicking on the Search button.
- View expired accounts. By default all accounts are displayed, the list can be limited by selecting one or more statuses of "Active", "Expired" or "None" then clicking on the search button. Note that status "None" means the user has registered an account but not completed the activation process.
- Use the "Export to CSV" link *to save the list of users* to a file that can be viewed in Microsoft Excel or similar.

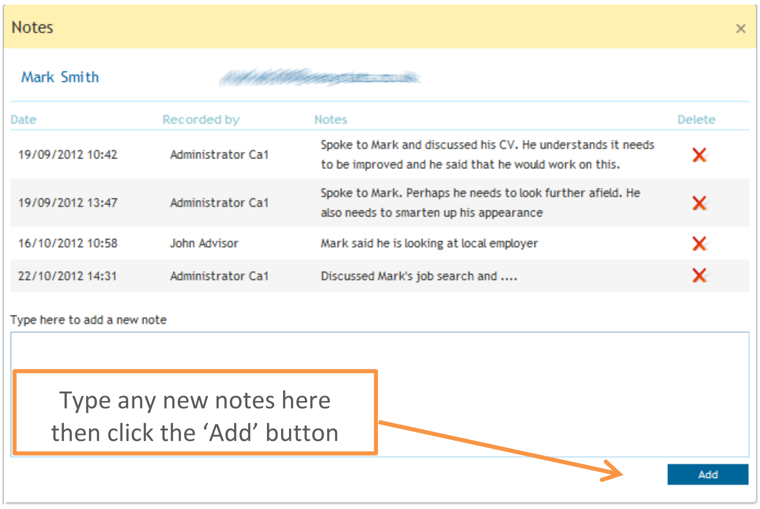


An individual user's Aptem account can be managed from the Users Report. Each line provides summary account information on a user, such as the subscription date and duration of their account, and current account status.



The following actions are available:

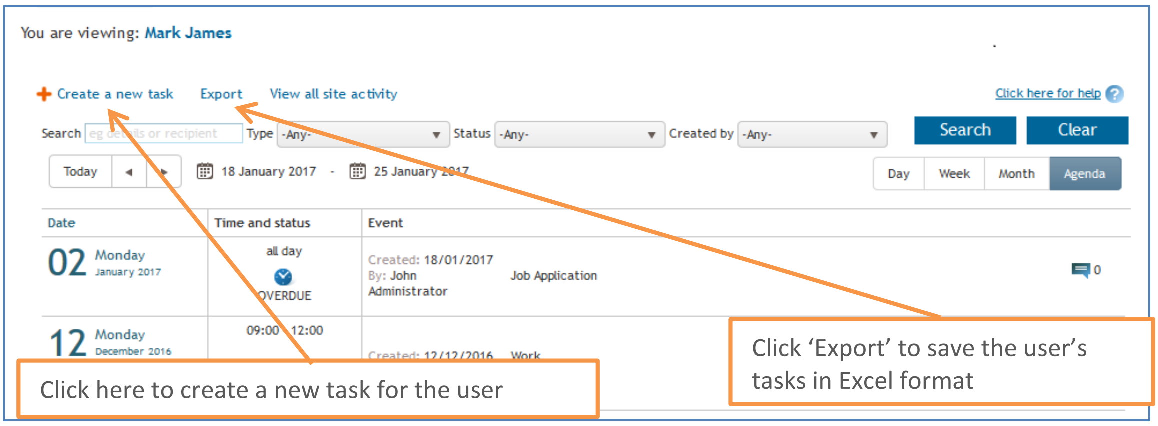
- View a detailed profile for the user (see section User Profile Report).
- Review and update notes on the user's progress. Click on the orange document icon to display the notes screen.



Type any new notes on the user and click the 'Add' button. The time and date of the new note will be automatically recorded. Notes will be visible to all administrators who have access to your organisation's Aptem account.

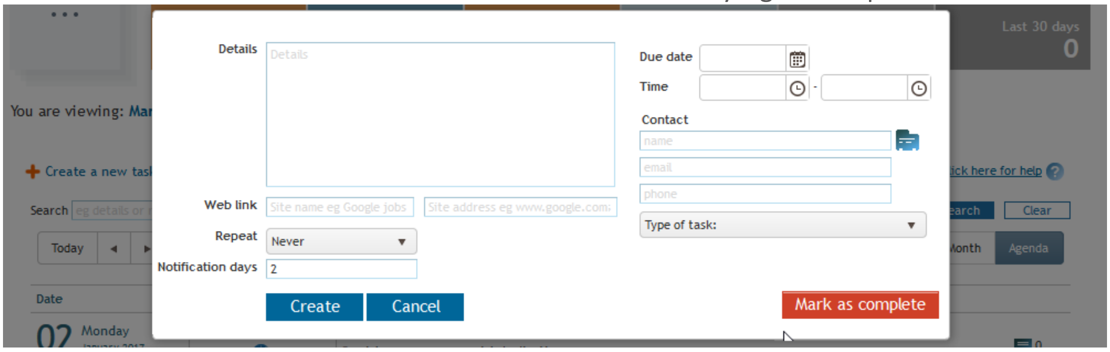
- Review and add to the user's task list.

When providing remote support to users it can be helpful to review their task lists and add reminders to undertake key job search activities or flag upcoming events.



Administrators can review a user's task list and add new tasks by clicking on the "Create a new task" link.

The following screen will be displayed. Insert the appropriate details and click on the update button. The task will be visible to the user the next time they sign into Aptem.

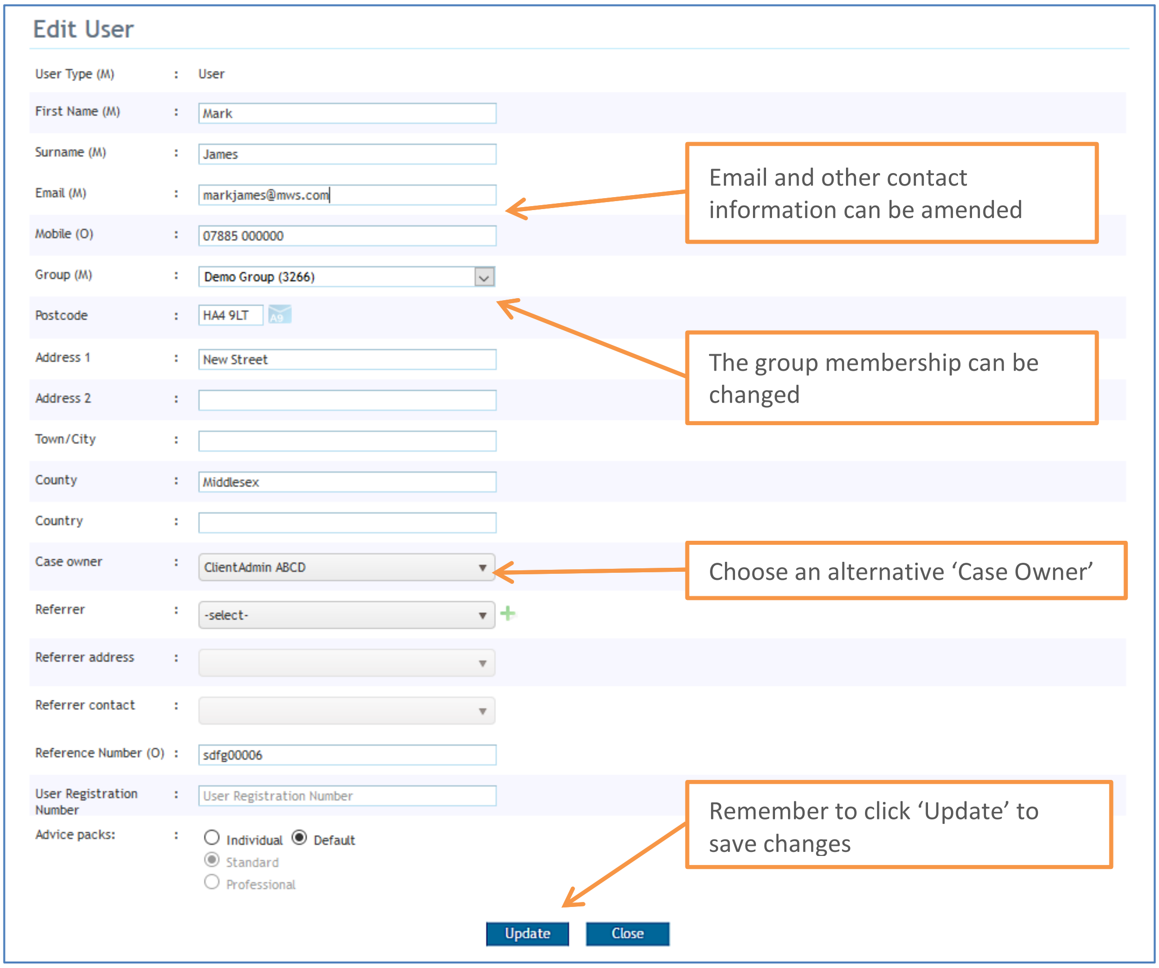


- Update contact details

In the Users Report click on the relevant pencil ‘edit’ icon to view the user’s details.

If a user no longer has access to the email address they used to register with Aptem then their contact details can be edited and changes saved by clicking on the ‘Update’ button.

Aptem recommends only changing contact details when they are from an authenticated source.

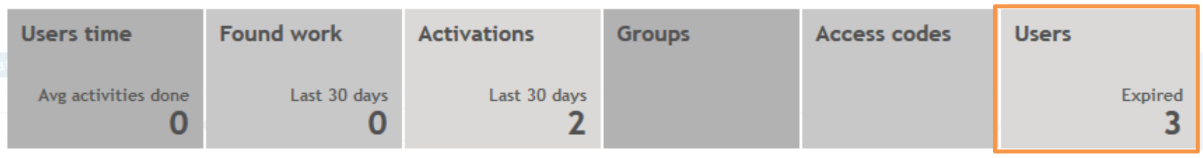


Enrolling an individual onto a programme

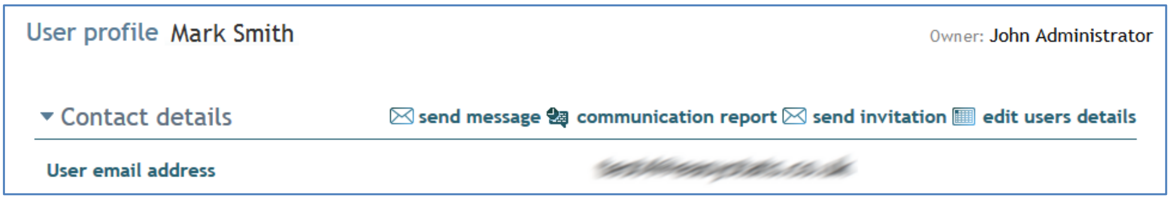
Individual users can be enrolled on the programme using the following process. If a large number of users need to be enrolled onto a programme then it is more efficient to create a group and apply a default programme to the group (see the section [Automatically enrolling a group onto a programme] for details on how to do this).

1. Sign in to your administrator account.

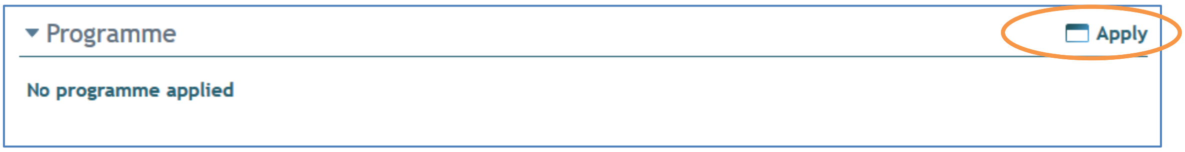
2. In the navigation panel click on the **Users** tile which will display the Users page.



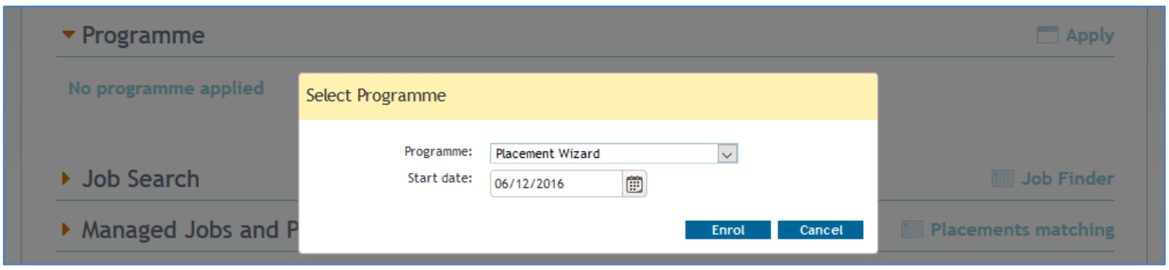
3. Search for the user who you wish to enrol and click on their name to view their individual profile report.



4. Scroll down the individual profile to the Programme section, and click on 'Apply'.



In the 'Select Programme' window, choose the required programme; select a start date (by default the start date is set to the current date); and then click on 'enrol'.



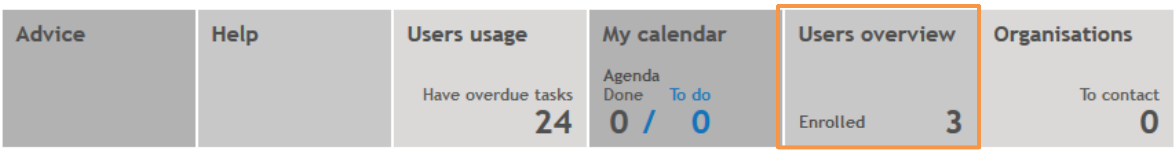
The user will be enrolled onto the programme. When they next sign into Aptem they will be able to complete the Work Placement Wizard.

The Programme section of the user's profile page will be automatically updated to reflect progress through the programme.

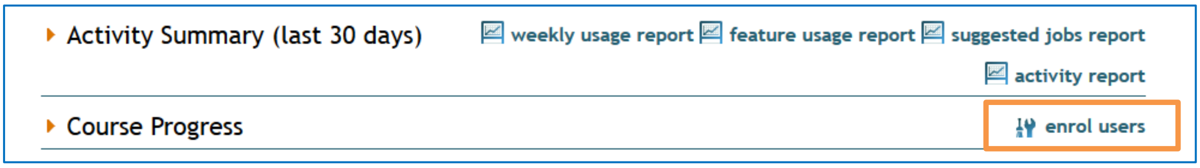
Enrolling users on a course

This section explains how to enrol a user onto a course that has been created in your organisation's account. If there are no courses in your account then please contact the Aptem client support team on 020 7870 1000.

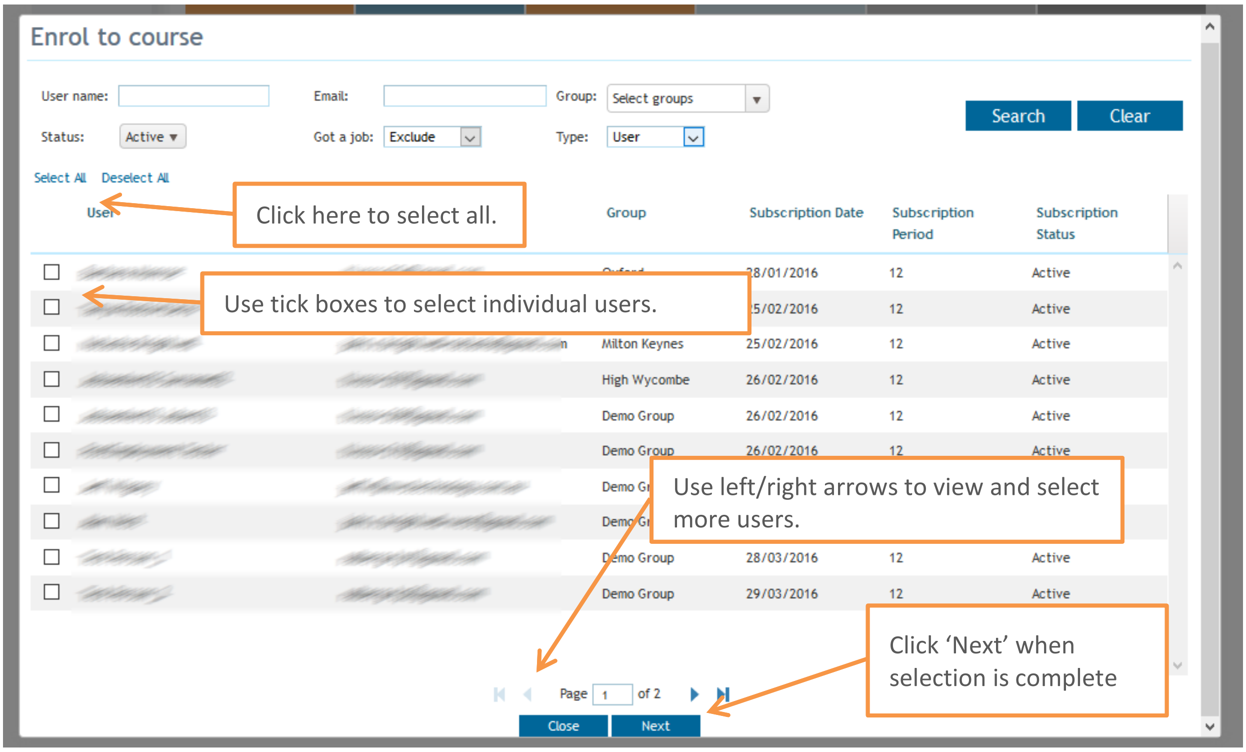
1. Sign in to your administrator account.
2. In the Navigation panel click on the 'Users Overview' tile to display the Users Group Profile page.



3. In the Course Progress section click on 'enrol users'.

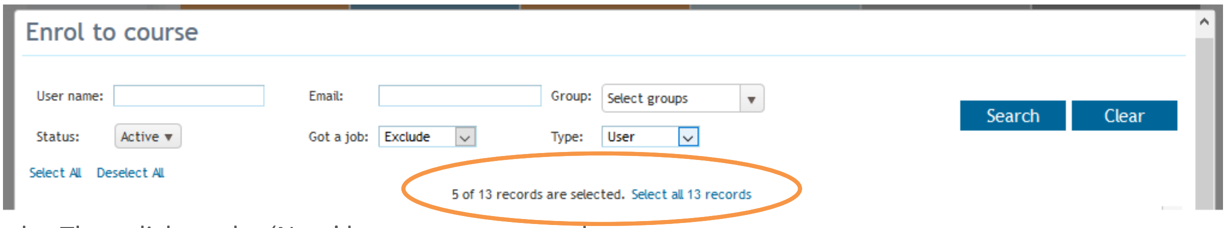


4. This will display the 'Enrol to course' screen which lists the users that are visible to your account.



a. Use the tick boxes to select which individual(s) you wish to enrol onto a particular course.
b. The page navigation arrows can be used to choose users from multiple pages.

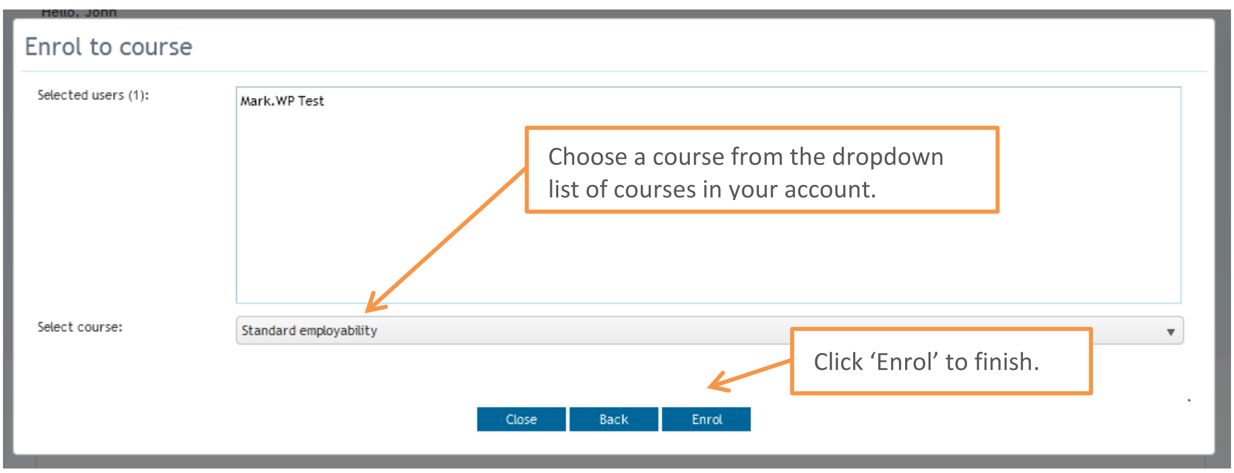
c. Note that if you use the 'Select All' option all individuals on the current page will be selected, and you will have the option of selecting all individuals within the selected groups.



d. Then click on the 'Next' button to move to the next screen.

5. The enrol page will display a list of the selected users. Choose the required course from the dropdown list and click on the 'Enrol' button. The selected individuals will be enrolled on that course, and will begin the course the next time they sign into Aptem.

   A warning message will be displayed if any of those selected are currently completing a course – as enrolling them on a new course will stop their previous one. To check if an individual is already on a course, click on their name to view a detailed profile for that person.

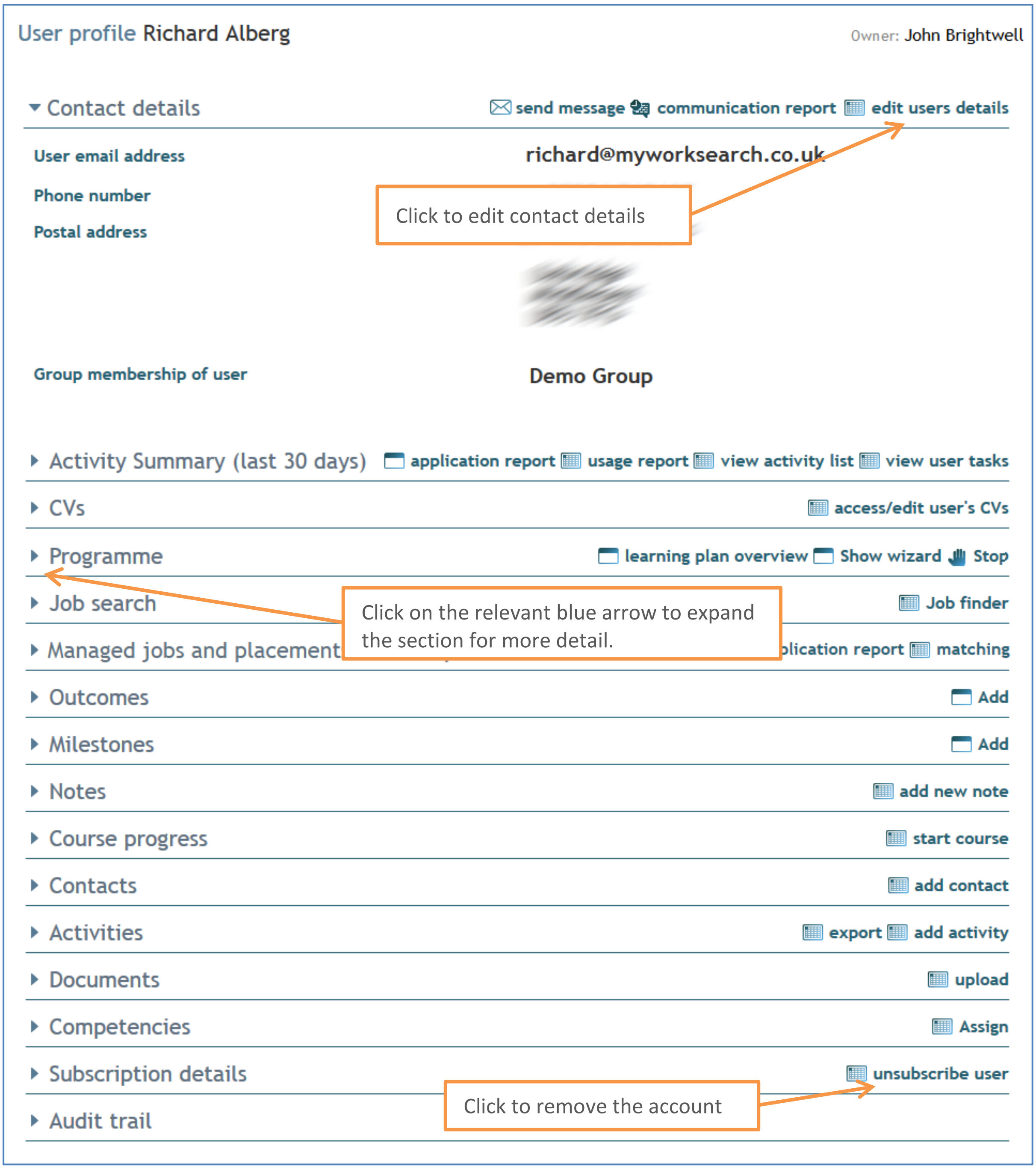


User Profile Report

This section explains the User Profile report, which shows key details for an individual user and contains links to key administrative tasks.

The profile report for any Aptem user can be accessed by clicking on their name in any of the following reports: User Report, Course Progress Reports, Access Codes Report, Account Activation Report, and Usage Report.

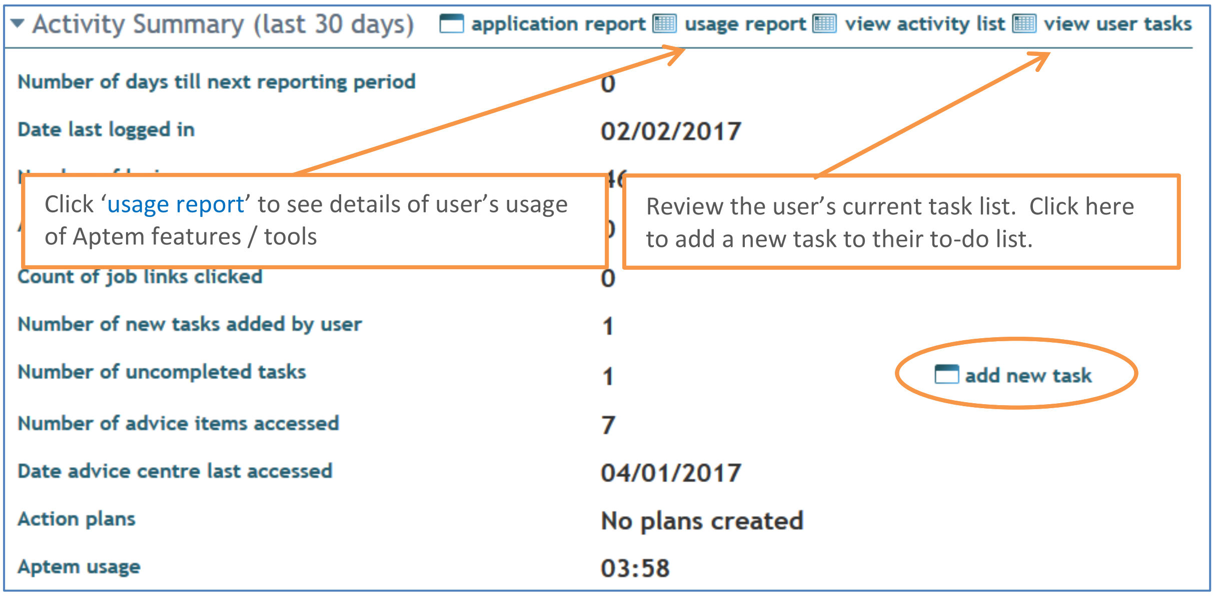
The report contains a number of sections covering each aspect of the user's Aptem activity with links to view more details, update progress and amend the support provided to the user.



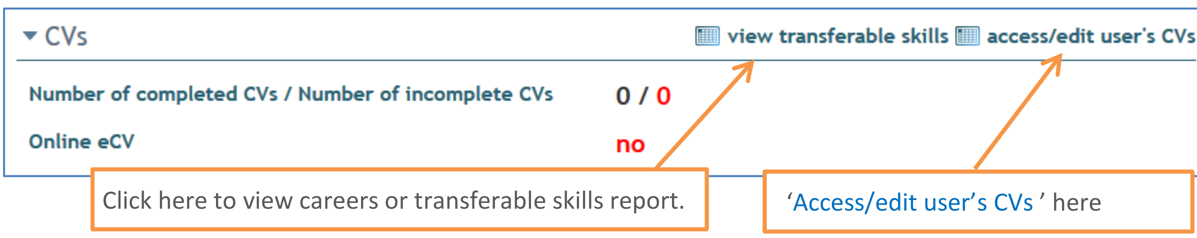
The user profile includes the following sections, some may not be available depending on the Aptem functionality enabled in your organisation's account:

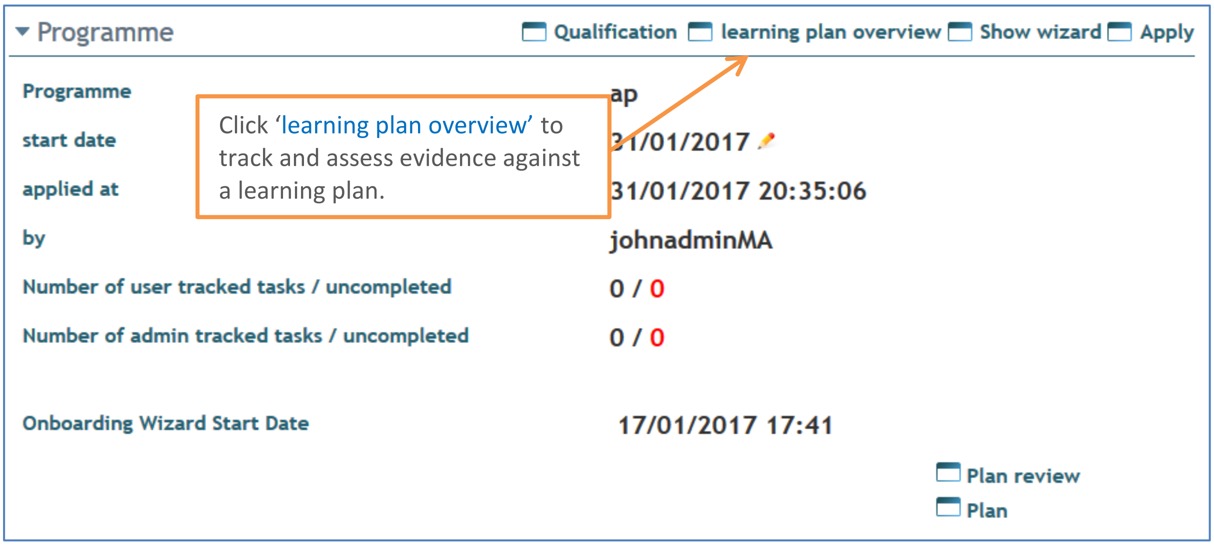
- Activity Summary (past 30 days)
- CVs
- Programme (if enabled)
- Job Search
- Managed Jobs and Placements (if enabled)
- Outcomes
- Milestones
- Notes (for advisors to record progress comments)
- Course Progress (if enabled)
- Contacts
- Activities
- Documents
- Competencies (if enabled)
- Subscription Details
- Audit trail

The Activity Summary provides an overview of the user's activity for the past 30 days. Administrators can see the number of logins, job links clicked and application made. This section also lists any action plans being followed with a link to view progress.

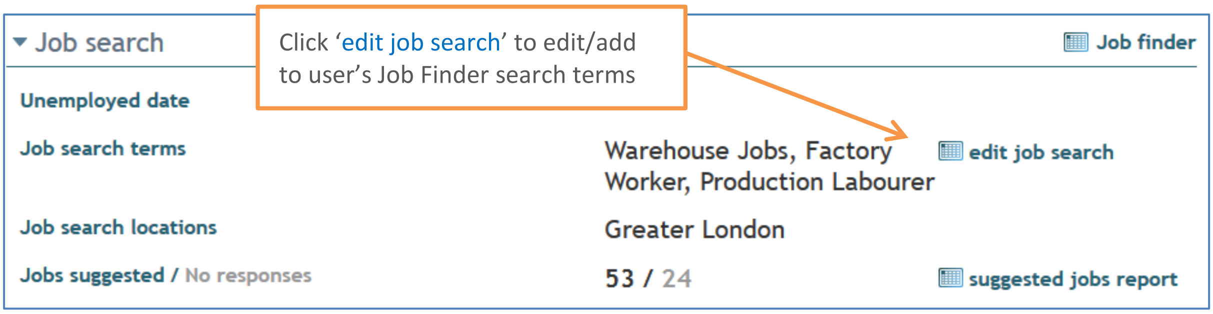


The CVs section can be used to view and edit the user's CV.

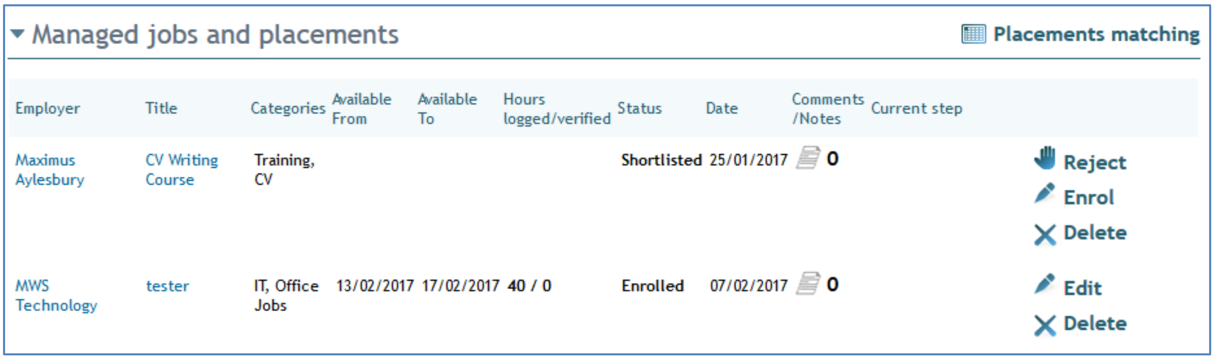




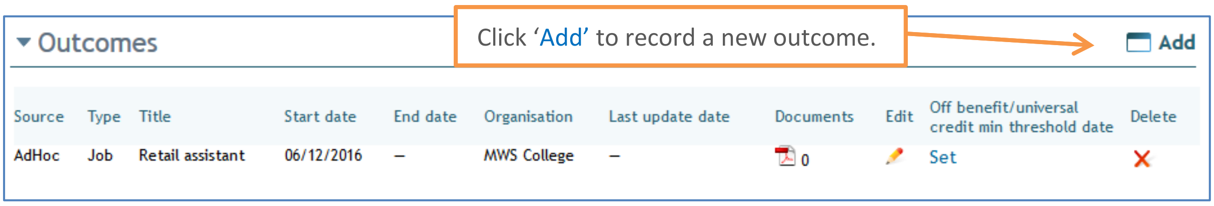
The Job Search section allows administrators to view and edit the search terms used by a user. For example if a user has unnecessary limited the types of jobs they are searching for, these can be amended using the 'edit job search' link.



The Managed Jobs and Placements section provides an overview of the user's work placements. If the work placements involve an application process then the user's applications can be updated as needed.



The Outcomes section displays any recorded outcomes for the user, which may be linked to funding.



The Milestones sections displays any progress milestones reached as part of a programme.

Milestones — Add

Programme	Description	Date	Emp Wks left	Alw Wks left	Status	Claimed	Edit
BBO programme	sustained employment milestone	23/01/2017	0	0	Achieved	Claimed	

Course progress — start course

Click to view progress report

Is locked	Course name	Count of completed steps/ % completed.	Status	
☐	Test for TranfsSkills	9 / 21%	Pending	Report

Competencies — Assign

Use Dashboard to review and assess progress against competencies

Competency plan name	Competency name	
Employability 1	Employability: Employee level	Dashboard Delete Report

The Documents section can be used to upload useful employability related documents, for example user certificates or work experience appraisals.

Documents — upload

07/02/2017	appraisal document from voluntary work
07/02/2017	Your Transferable Skills Profile

The Notes section documents any notes that advisors have made on the progress of the Aptem user.

Notes — add new note

text	administrator	date time
Discussed frequency of job search. Encouraged to log on 3 times per week	John Administrator	07.02.2017 05:54
Discussed his CV. Suggested creating different versions for target jobs.	John Administrator	07.02.2017 05:54

Earlier notes visible here

Click 'add new note' to update advisor notes on the user's progress

Audit trail

Date ▾	Admin	Action	Changes	
			Property	Value
31/01/2017	Mark Smith	Saved	Gender	Male

Using the Aptem Collaboration Centre

The Aptem Collaboration Centre™ allows administrators to communicate with users by sending messages, reminders of missed milestones, and notifications of new tasks. The Collaboration Centre interface will be familiar to those who use messaging apps such as Facebook and Skype.

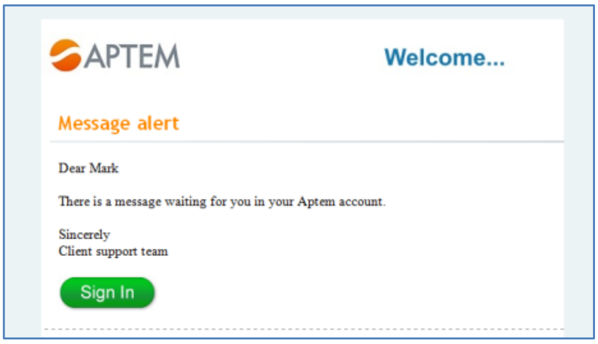
If enabled in your account the collaboration centre will be available to administrators and Aptem users, and can be made available to employer contacts. It can be disabled within individual programmes if these features are not required.

The collaboration centre interface and features are the same for both administrators, employers and Aptem users.

Note that administrators can send messages and interact through the collaboration centre with any Aptem user within their account. Once a user receives a message from an administrator he/she is able to reply. Users are only able to message their account owner, designated employer contact or other administrators who have initiated contact with them. However users are not able to message other users.

Checking for messages

You will be notified by email of any new messages in the collaboration centre.



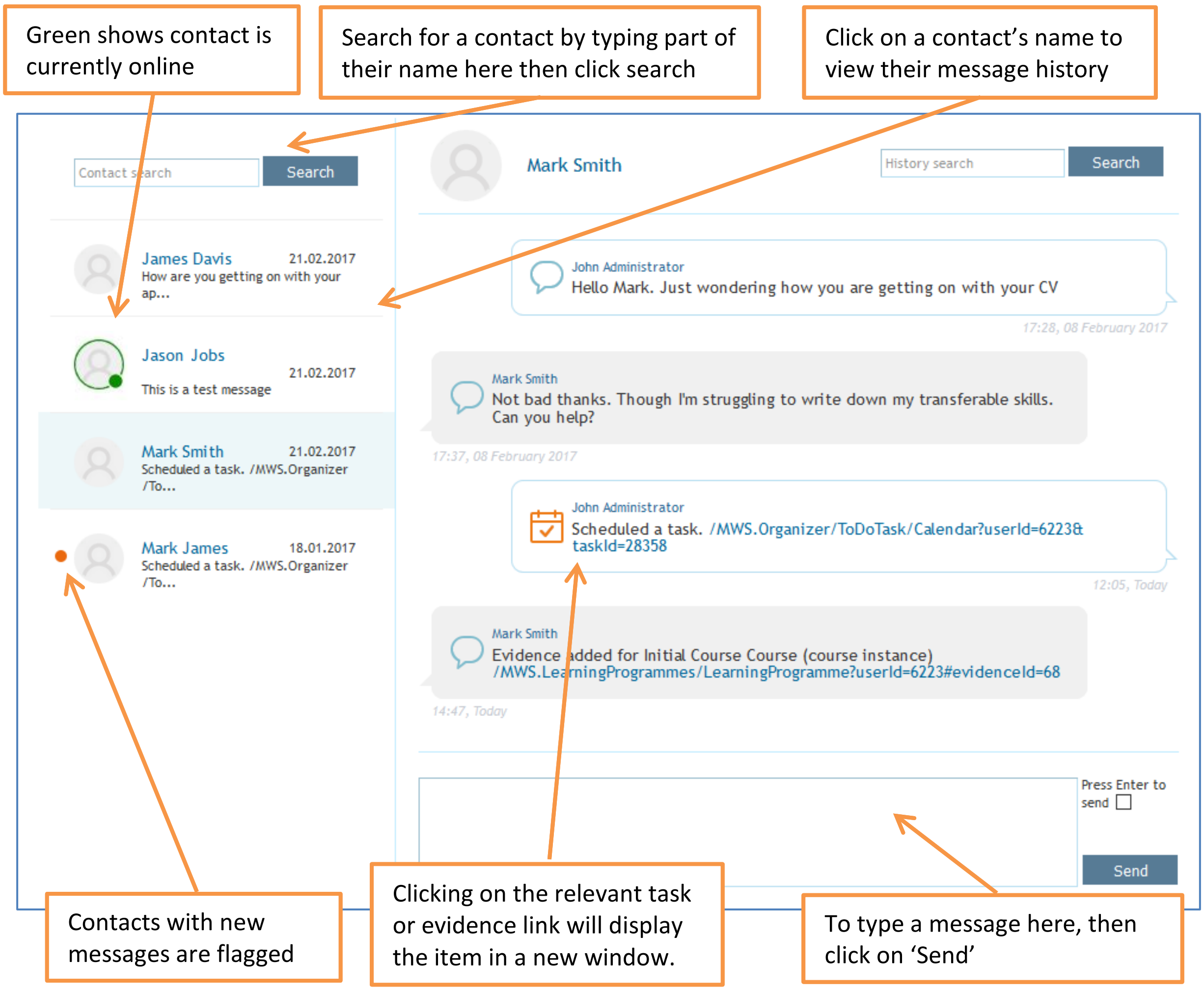
In addition when you sign into your Aptem account, the left hand side of the navigation panel will display an orange dot.

1. Sign in to your account and click on the **Collaboration centre** tile. For information the tile will display the number of new messages.

2. The Collaboration centre page will be displayed. The left hand panel of this page shows all those who you have been messaging.

   - Any contact with new unseen messages will be indicated by an orange dot.
   - Contacts who are currently online are outlined in green
   - Click on a contact's name to view messages from that contact.
   - The search box can be used to find a contact – note that the search results only include users with an active account.

   There are three types of messages:
   - Text based messages,
   - Reminders of new tasks – for example where an administrator creates a new task for the user.
   - Notifications regarding evidence for learning plans (if enabled), where a user has uploaded evidence to their learning plan. (see section [Users provide evidence for their learning plan]).



Any replies will be displayed in the contact's collaboration centre page.

Using the Learning Plan to track blended learning

The Learning Plan feature allows the delivery and monitoring of blended learning programmes. It is particularly suited to apprenticeship programmes where progress and outcomes are tracked against standards, but can used for any programme assessed against structured criteria and indicators, for example, NVQs and other qualifications. This feature needs to be enabled within a programme in your account.

A learning plan comprises a set of learning activities, which can include courses, assessments, workshops and placements managed through Aptem, as well as external learning and assessment activities where the evidence is uploaded against the user's profile in Aptem.

A learning plan also requires a set of criteria against which the learning activities have been mapped: for example, Skills, Knowledge and Behaviours from an apprenticeship standard or assessment criteria from a qualification. Learning activities can be simultaneously mapped against (for example) an apprenticeship standards and a certification or qualification. As users complete the activities in the plan a portfolio of evidence is collected showing they have fulfilled the associated criteria or standards.

Learning plans and apprenticeships / qualifications

The learning plan is effective in tracking progress against an Apprenticeship Standard whether the training content does or does not include a qualification. Under current ESFA funding guidelines (2018) an apprenticeship requires the following components which should be included in the Aptem Learning plan:

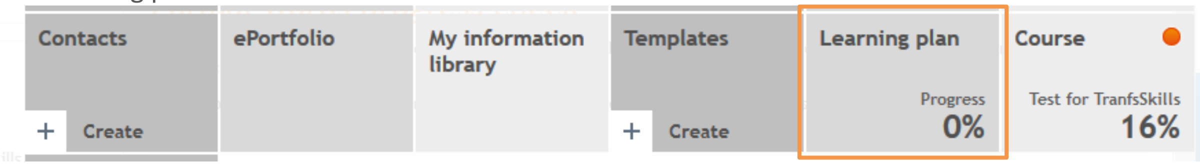
- Assessment and evidence of Level 2 functional skills in English and Mathematics. A link to a third party assessment can be added as an item to the learning plan, otherwise learner can upload prior evidence of achieving GCSE grade C (or grade 5, post-2018) and above in these subjects or equivalent.
- Regular planned progress review meetings between the training provider and the learner. These events (e.g. fortnightly) are automatically populated in the learner's plan and task list.
- Quarterly review meetings between the learner, their employer and the training provider. These are automatically populated from the user's start date on the learning plan.
- End Point Assessment (EPA) Gateway assessment. Before taking the EPA there must be a check to ensure the learner has meet the assessment plan requirements including English and maths qualifications (where applicable), on-programme mandatory qualifications (where applicable) along with evidence that the learner has achieved the knowledge, skills and behaviours.
- End Point Assessment review. The end-point assessment can only be taken after the minimum duration of the apprenticeship has been completed and the earliest due date will be automatically populated.

If required additional learning components or tasks can be added to the learning plan on an individual by individual basis.

Users provide evidence for their learning plan

Users access their (blended) learning plan through their navigation panel. They have freedom to work on any component within the plan and should upload evidence for learning outcomes. This evidence can be in the form of Microsoft office, image, pdf, audio and video files.

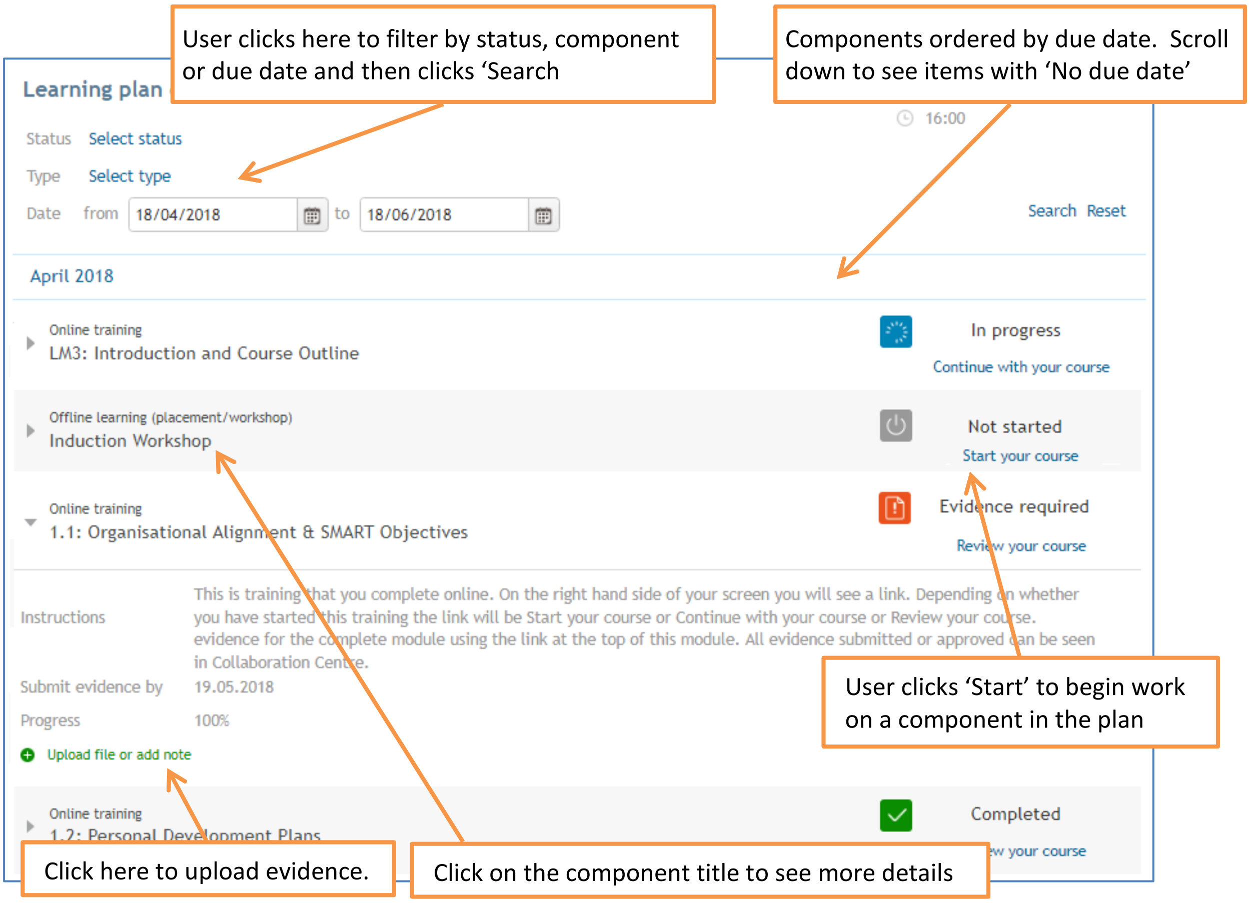
1. The user signs into their Aptem account and in the navigation panel clicks on the '***Learning Plan***' tile. Note that the tile will display to the user their current overall percentage progress on their learning plan.



Their learning plan overview page will be displayed. This page shows the status of each of the learning plan components: grey means not started; blue means in progress; amber means imminent deadline, green means completed and red signifies overdue or incomplete.

For components delivered or managed through Aptem (e.g. Aptem courses, learning placements, and assessment forms) the user can click on the relevant link to start or continue with that component.

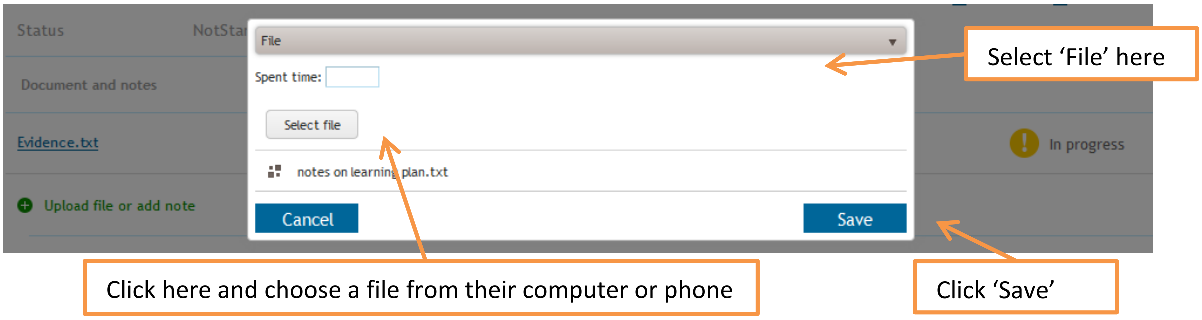
The detail for each component can be viewed by clicking on the relevant expand icon. This will display any instructions, a deadline date (if set) and percentage progress for that component, with the option to upload learning evidence for that specific learning activity.



By default all components are displayed in 'collapsed' mode which only shows the component title and status icon. The list can be filtered by status type e.g. evidence required.

Clicking on the title of a component will display more details. This will expand the section to show the following:

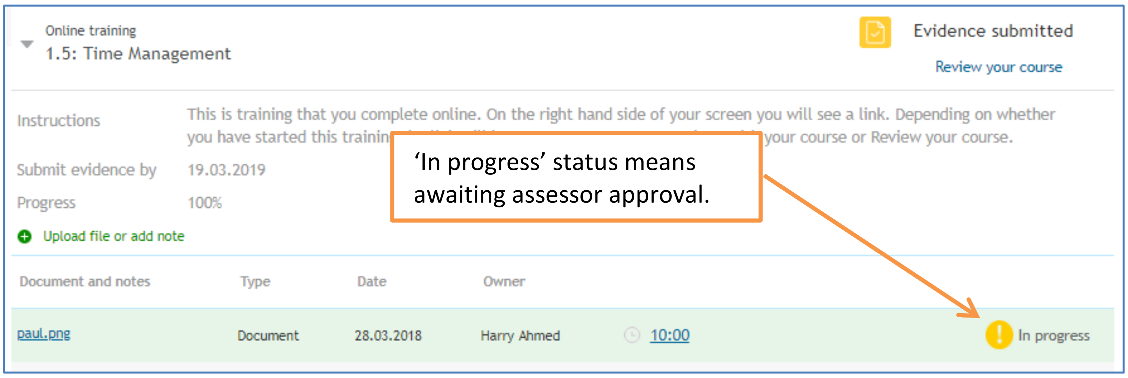
- A list of existing evidence that has been uploaded.
- A link to upload new evidence as a Microsoft office, pdf, image, audio or video file.
- To add evidence to a component click on the 'Upload file or add note' link, and from the dropdown list select 'File'. Note that selecting 'note' allows the user to add a text comment to their plan.



Once uploaded the learning plan page will automatically update to show the uploaded but unapproved evidence.

The case owner for the user will automatically receive notification via email and the Aptem Collaboration Centre that the user has submitted evidence against their learning plan.

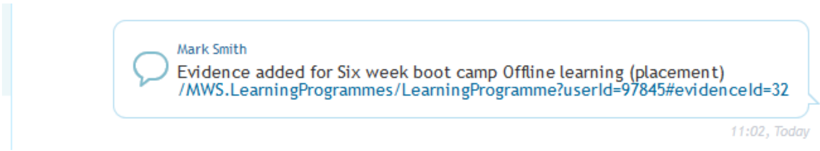
Once submitted the user's view of the Learning plan will show the status "Evidence submitted" for that learning activity, and 'in progress' will be displayed against the individual evidence item. The status will be automatically updated once the evidence has been accepted or declined.



Approving evidence

The administrator (case owner) will be notified, through the Aptem Collaboration Centre and email, that a user has submitted evidence for their learning plan.

1. Sign into your administrator account and click on the **Collaboration centre** tile. Then click on the link to the submitted evidence.

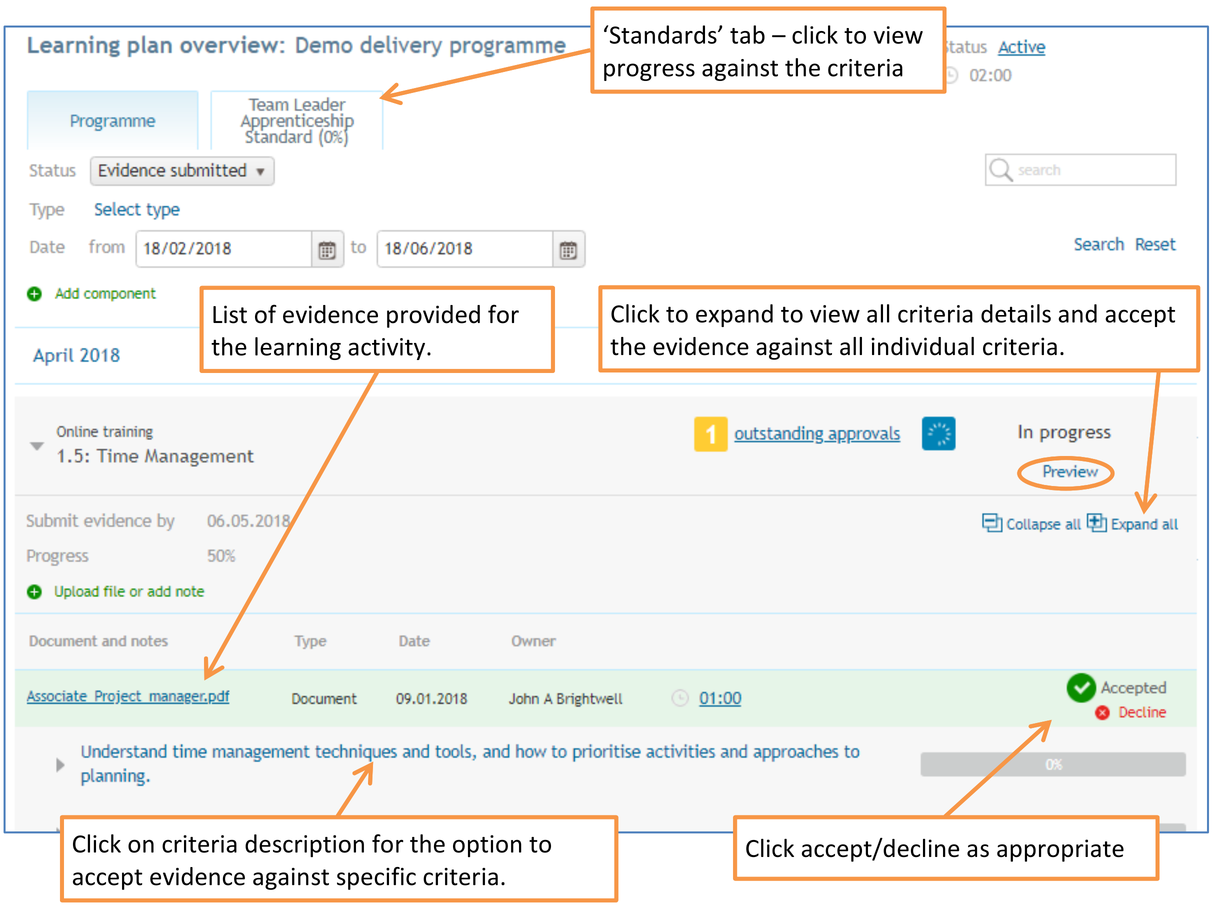


2. Depending on your internet browser settings the evidence file will be displayed in a new browser tab or downloaded. If the component is an online course tutors can review the content by clicking on the relevant 'Preview' link.

3. The relevant component in the Learning Plan will also be displayed. Below the component title a list of submitted evidence will be shown as well as the assessment/outcome criteria related to that learning activity. After reviewing the uploaded evidence there are two options:

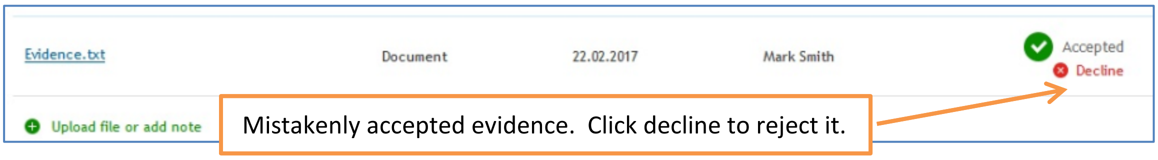
    - If the evidence provided meets all associated criteria then click on the visible 'Accept' link.
    - However if the evidence does not meet all criteria but wholly or partially meets one of the associated criteria then click on the relevant criteria description to expand the section. This will display further options and the evidence can be accepted against the individual criteria.

   When accepting (or declining) evidence administrators can add comments in the note field and selected the percentage of the criteria met. The progress bars for each associated assessment criteria will subsequently update to reflect progress.



Where evidence has been accepted, the relevant progress bars will be proportionally shaded green to signify the approved progress against the learning plan criteria.

Approvals or rejection of a user's submitted evidence can be changed on review. The administrator can access the learning plan and change their assessment by clicking on the appropriate decision. The evidence will be removed from the learning plan.



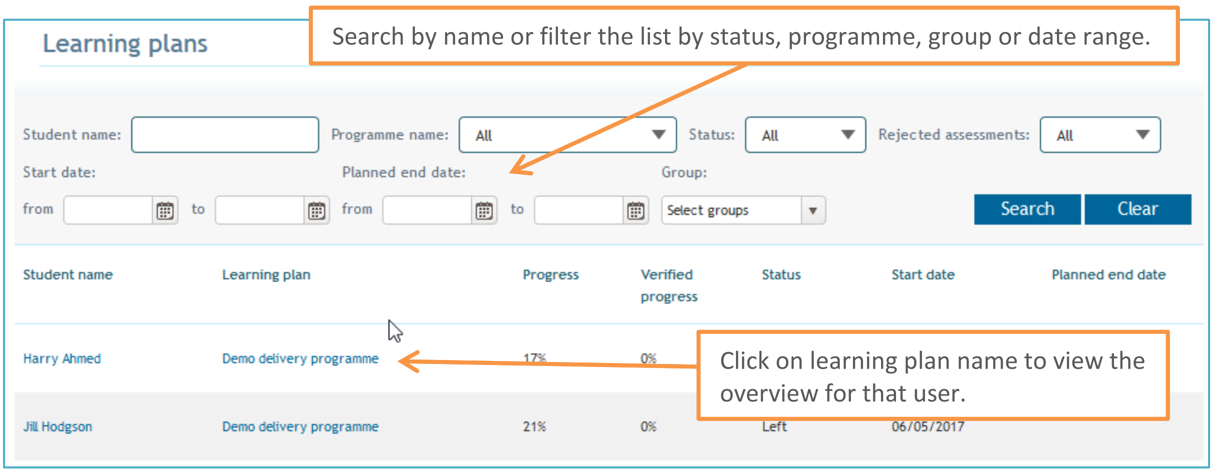
Monitoring user progress on learning plans

The learning plans report provides an overview of users completion progress for their learning plan. This report can be used to access a more detailed report for each individual.

The Learning Plans report

1. Sign into your administration account, and click on the '***Learning Plans***' tile to display the Learning Plans report.

2. The Learning Plans report lists all users within your account who have been enrolled onto a learning plan. The list can be filtered by start and planned end date, programme name, status (e.g. completed, active) and group..



This report shows the percentage progress for each person. Click on an individual's name to view their profile page, and click on their plan's name to view a detailed progress report (see below).

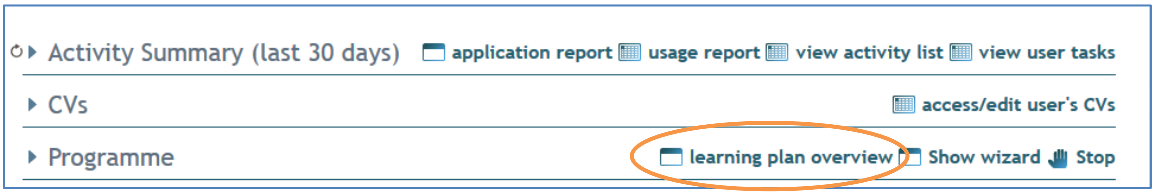
A user’s learning plan overview

The progress of a user through their learning plan can also be monitored by accessing their individual profile page and clicking on the link to their learning plan overview or using the link in the Learning Plans report.

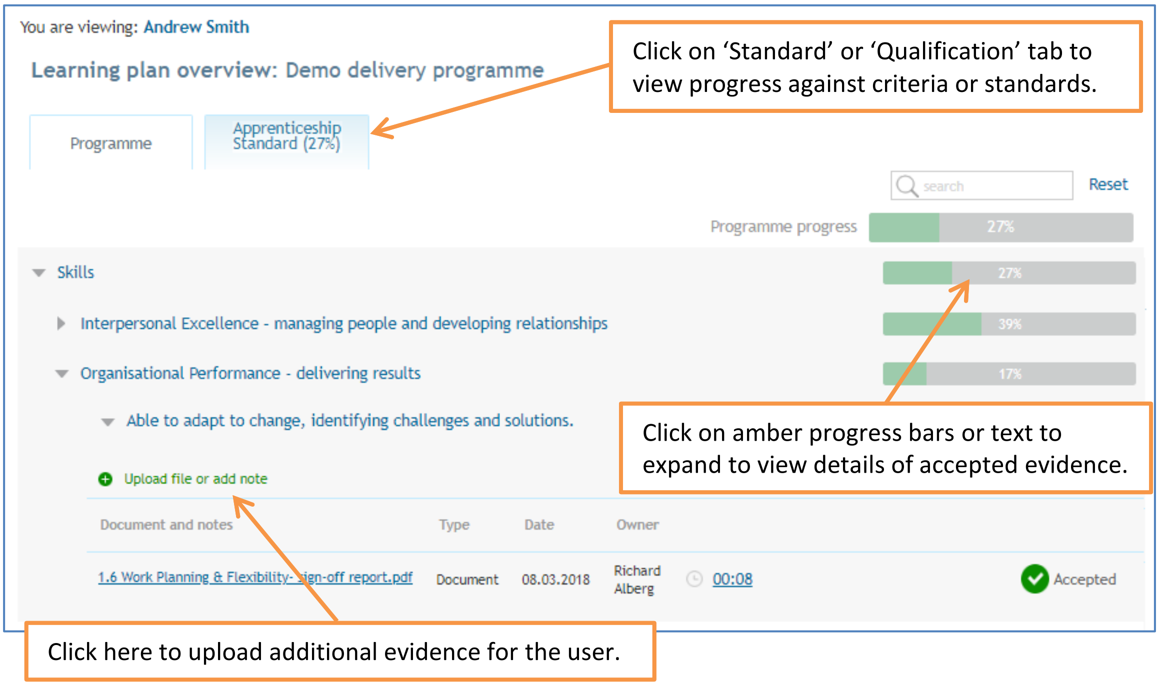
1. Sign into your administration account, and click on the ‘***Users***’ tile to display the list of users in your account.

2. Search for the name of the user and click on their name to view their profile page.

3. In the Programme section click on the ‘Learning plan overview’ link to view their plan



4. By default progress is shown against the programme components. However clicking on the ‘Standard’ and/or ‘Qualification’ tab shows progress against the criteria.



Progress bars are shaded green to indicate the percentage progress that meets each criterion. Clicking on a progress bar or criterion title will expand the section show accepted evidence. Additional evidence can be uploaded by clicking on the relevant link. Note that learning plans displayed to user do not show the standards or qualification criteria. Learners can only upload evidence against a learning component or activity.

Adding personalised learning components for an individual user

There may be instances where additional components need to be added to your organisation's standard learning plan for a user. For example, a learner may need additional support in maths and thus given access to an additional online course, or a learner may need additional planned one-to-one meetings.

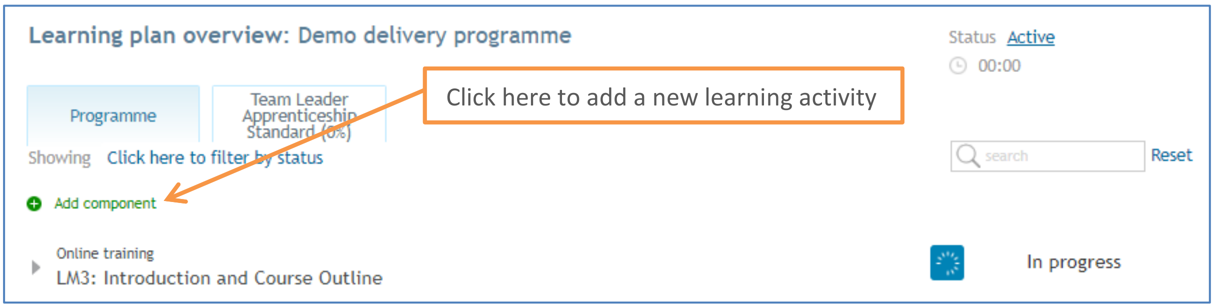
1. Sign into your administration account, and either:

    a. Click on the 'Users' tile, search for the user's name and access their individual profile page. Then click on the Learning plan overview link in their profile to view their learning plan.

    b. Or, click on the '***Learning Plans***' tile to display a list of users and their learning plans, then search for the user's name and click on the link to their learning plan.

2. The programme tab of the user's learning plan will be displayed. Next on 'Add component'.

The administrator (case owner) will be notified, through the Aptem Collaboration Centre and email, that a user has submitted evidence for their learning plan.



3. A new window will be displayed which allow the addition of new learning component for the individual learner.

    Note, if you wish the learning plan to be amended for all learners then the base programme will need to be edited – this can only be done if the 'programmes' tile and programme editing permissions have been enabled in your administrator account.

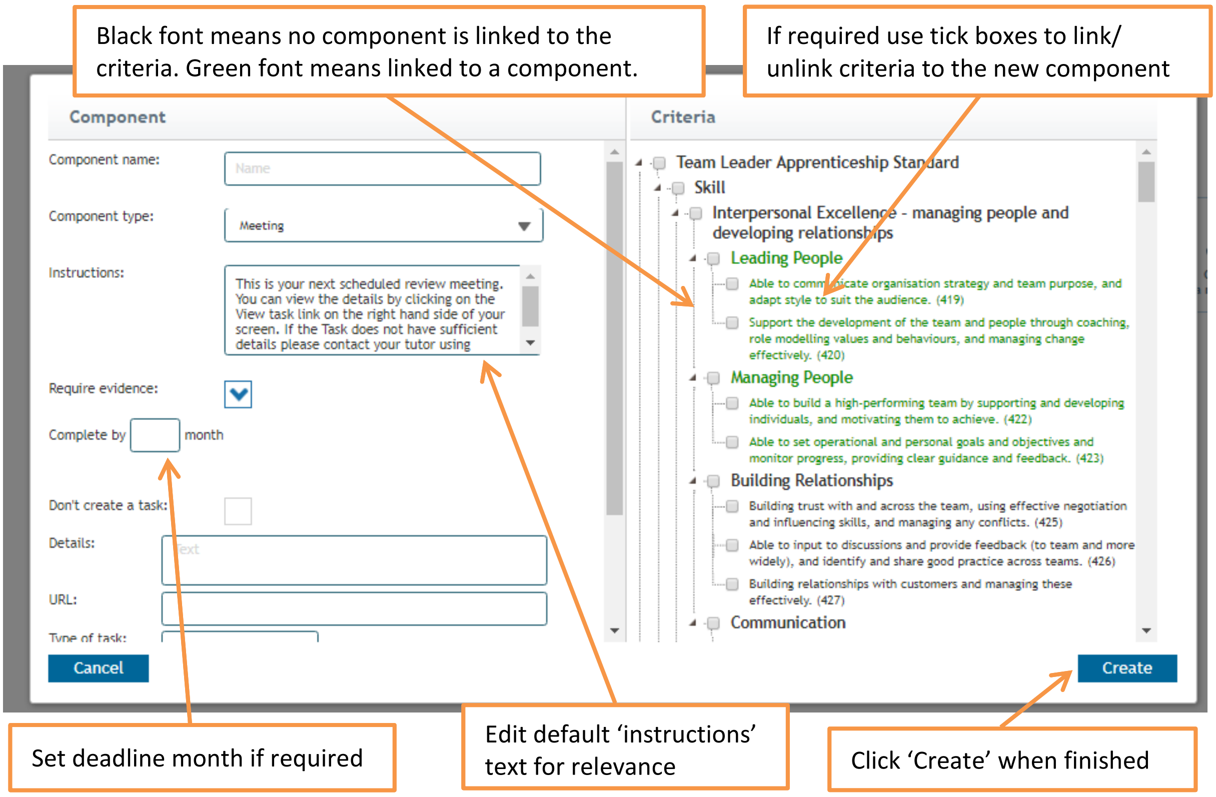
    The add component window allows for a number of different components to be added to the plan. If required these components may also be linked to assessment criteria in the learning plan.

    The component will need to be given:

    - A name, which will be displayed in the learning plan,
    - A deadline date (optional) – in terms of months/weeks from the start of the programme.
    - By default standard instructions will be displayed for the component in the user's learning plan – but this text can be edited to be more appropriate or personalised.
    - If required the component can be set to be repeated at set intervals e.g. for a meeting.

Other information required depends on the type of component selected. Available component options include:

- Qualification: provide the relevant ESFA learning aim reference number, level and qualification organisation.
- Online training: Adds an existing Aptem e-learning course to the learning plan. Enter the course name. By default learning evidence is required – but this can be deselected.
- Online training - external: Provides access to an online course or virtual learning environment hosted outside of Aptem.
- Offline learning (placement/workshop). Allows learner to be booked onto a placement or training workshop – select the relevant item from the list.
- Assessment: create a custom assessment form which can include a range of question response formats.
- Assignment (tasks): the assigned task can be a single event or repeated at set intervals
- Meeting: can be a single event or repeated at set intervals
- Schedule online event: e.g. a webinar which can be a single event or repeated at set intervals
- End-point assessment: provide the name
- Skills radar: see the section on Aptem Skills radar for tracking skills development

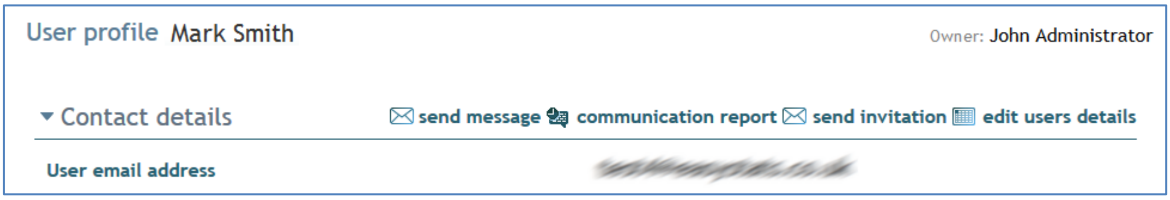


Select the relevant component type and complete the required information. If required, criteria can be assigned to the component by ticking the relevant criteria in the right hand panel. Finally click 'Create' to add the new component to the individual's learning plan.

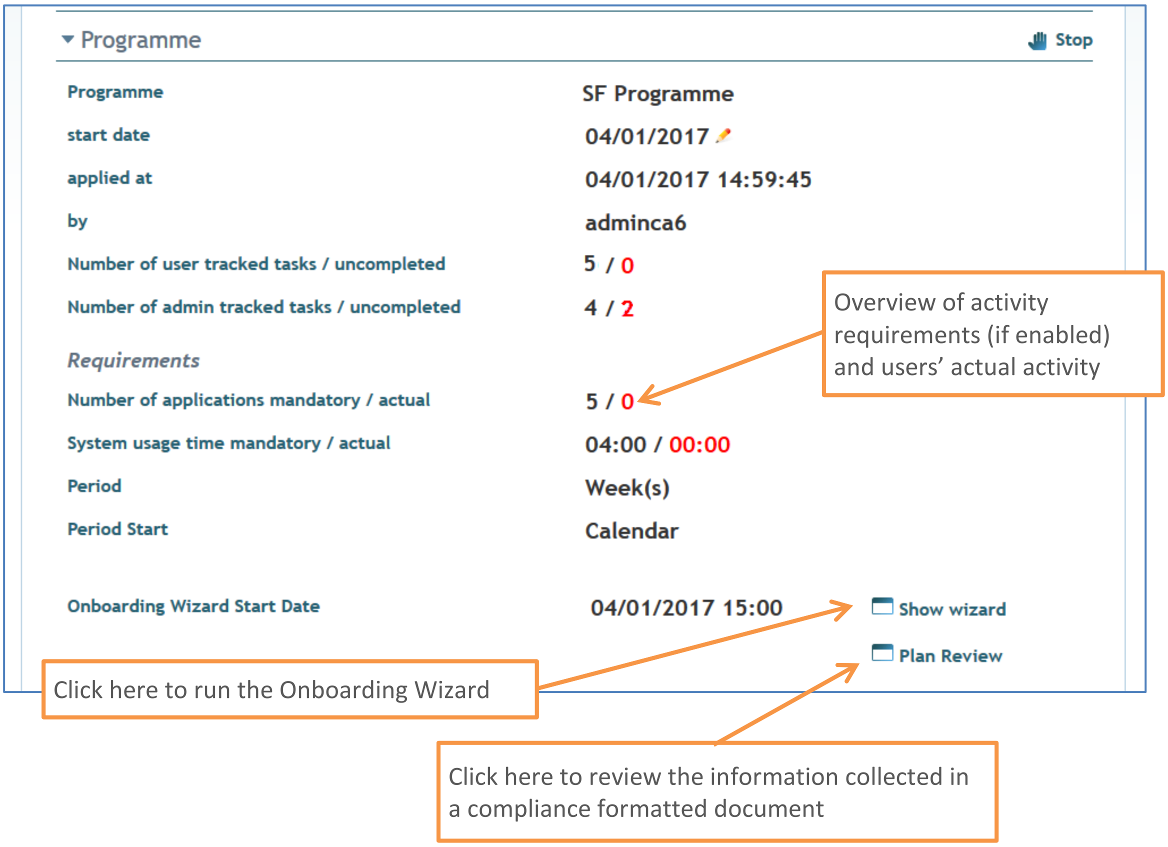
Monitoring an individual's progress on a programme

The progress of an individual user through a programme can be monitored from the Programme Section of that person's profile page.

1. Sign in to your administrator account.
2. In the navigation panel click on the **Users** tile which will display the Users page.
3. Search for the user's name in the User's report and click on their name to view their individual profile report.



4. Scroll down the individual profile report to the Programme section, which gives details on the programme being completed by the user. The progress overview will display a summary of key elements enables in the programme e.g. activity requirements, milestones and links to the Onboarding wizard.



Monitoring course progress

There are different types of courses within Aptem that may be available to your account:

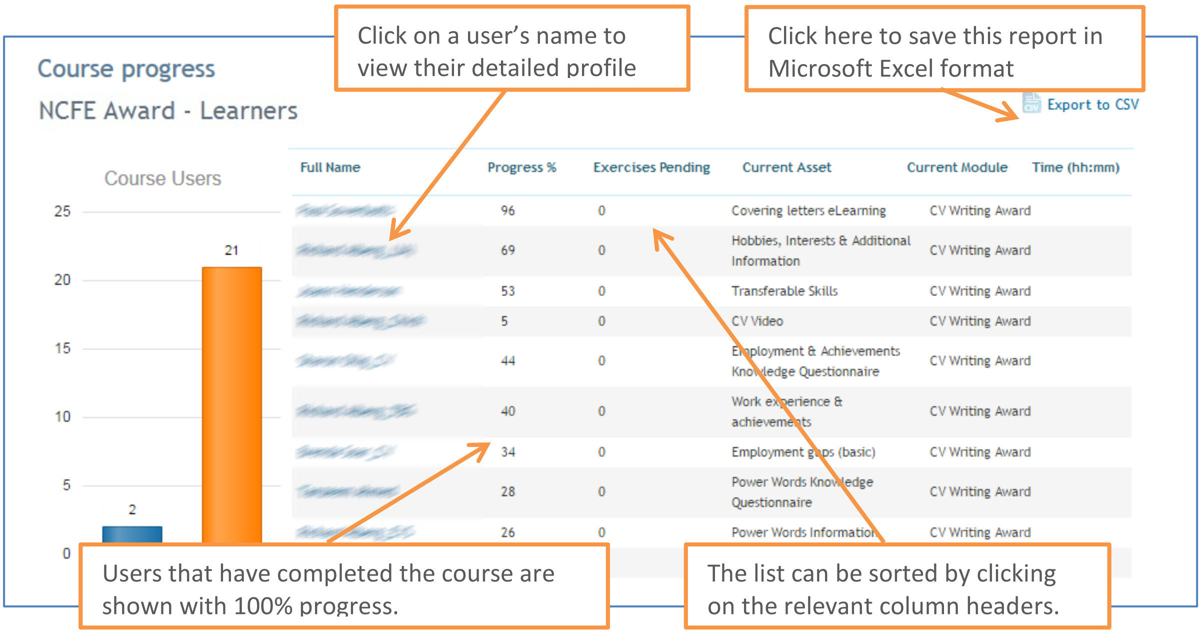
- **Foundation Courses** are where Aptem takes a user through a structured series of learning assets prior to using the main Aptem system.
- **Employment Units** are qualification courses with assessment that are mapped to awarding bodies.
- **Employability Modules** are courses based on Aptem's qualifications content, but without assessment, that can be used to provide an intensive course to an individual.
- **Tailored Courses** your organisation has created using existing Aptem content or your own learning content and assessments.

The Users Group Profile report lists all courses available to your account. To view details of users' progress through each course click on the relevant progress chart link, this will display a report for that particular course.

The Course Progress Report

The Course Progress Report provides information on users' progress in completing any employability courses or foundation courses available to your account.

The left hand chart shows how many users have completed the course and how many are still in progress.



The right hand side displays a list of all users enrolled on the course, with their current percentage progress through the course, number of pending exercises, as well as their current item and unit. The list can be sorted by clicking on the column headers, for example "Exercises Pending".

Note that access to additional course management functions will depend on the individual administrator account.

Managing courses and assessing employability units

This section explains how to manage courses within Aptem and assess user assignments.

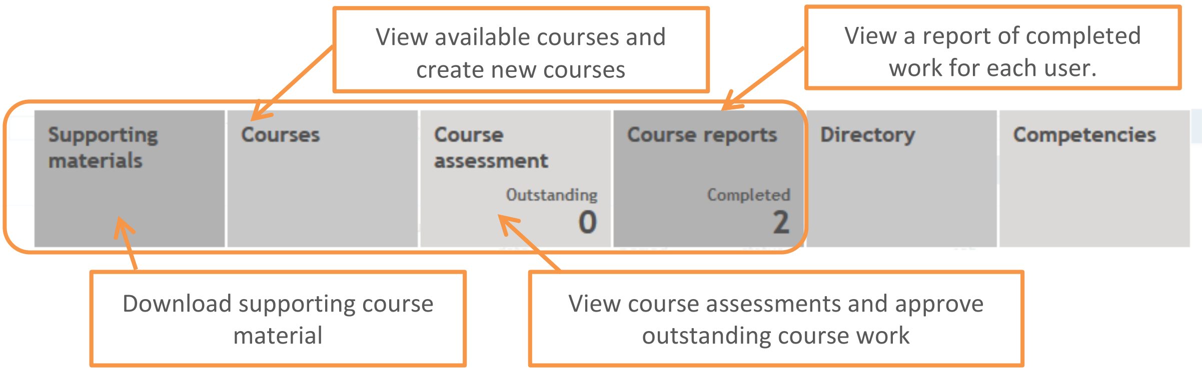
Aptem has the capability to deliver funded employability training where users complete structured study units and associated assessments. Aptem can also be used to deliver qualification and non-qualification courses; courses containing content selected from our library of employability training material as well as your own learning content which has been uploaded to Aptem.

If you wish to create your own bespoke courses using your own content then please contact the Aptem support team on 020 7870 1000 for a copy of the Aptem Course Builder Guide.

Tiles relating to courses will be visible in your navigation panel if this feature is available in your Aptem account, which include the following functions:

- Review, assess and approve computer delivered user assignments.
- Download supporting resources to support face-to-face assessments.

The following Course related tiles will be visible in the expanded navigation panel.

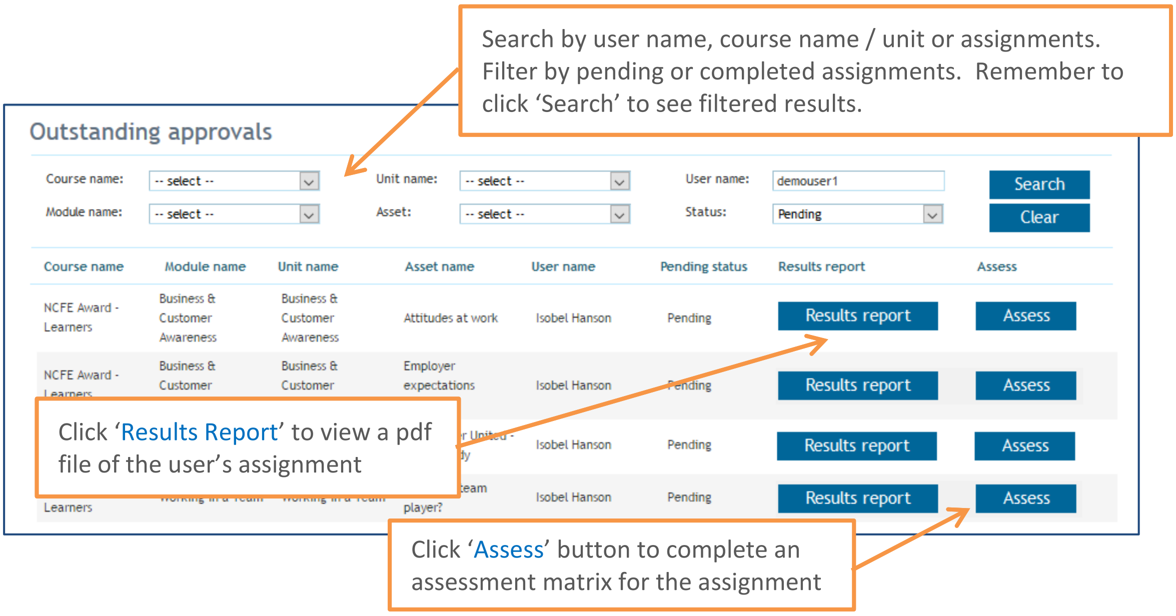


Reviewing and approving user assignments

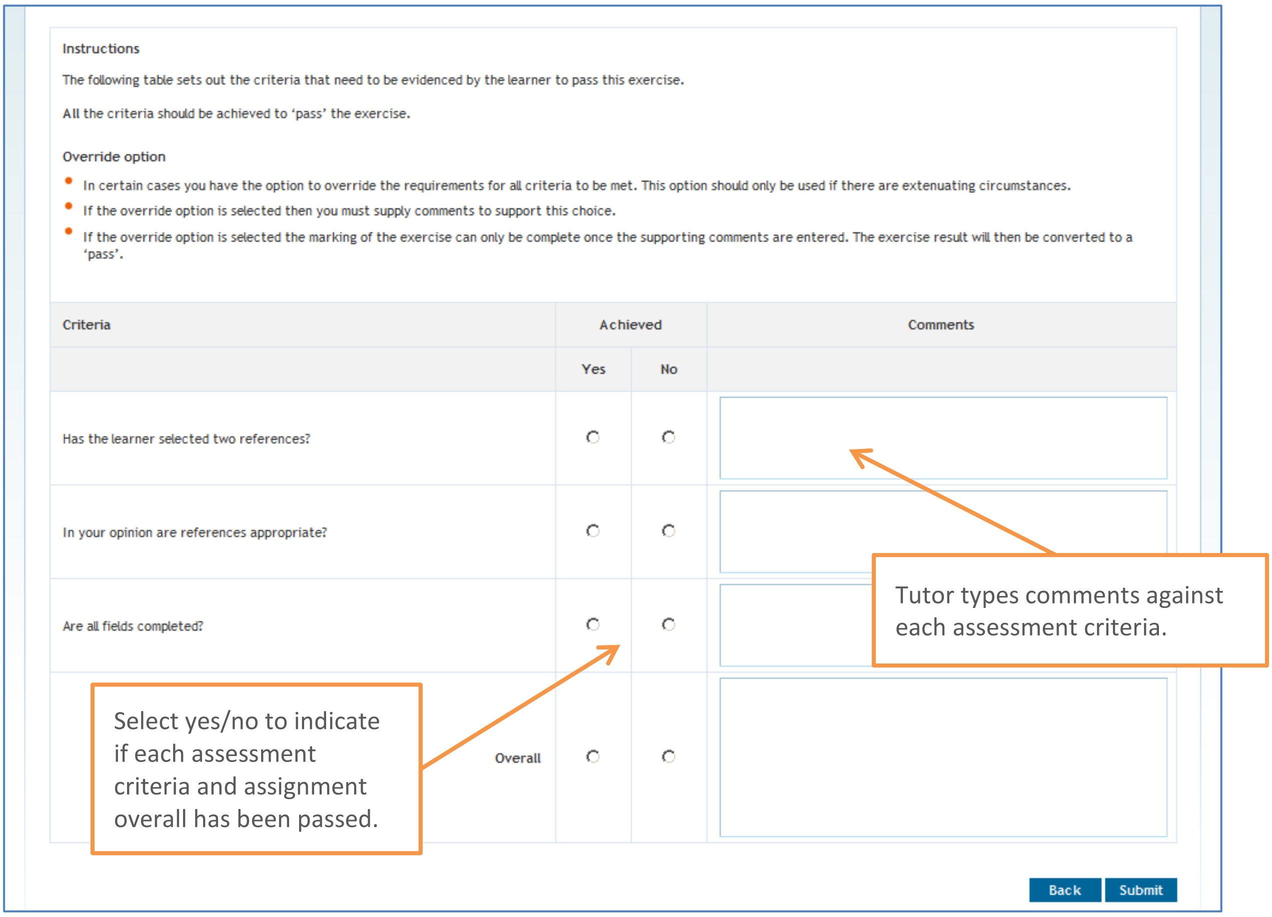
Courses can contain assessment such as knowledge tests, which are automatically scored, and tutor assessed assignments, e.g. writing a CV for a specific job advert.

This section describes how to review users' responses to knowledge tests and tutor assessed assignments.

1. Sign in to your administrator account.
2. The number of outstanding assessments to be reviewed will be displayed on the 'Course Assessment' tile within your navigation panel. Click on this tile to access the Outstanding approvals page.
3. The Outstanding approvals page will be displayed (see image next page). This page lists all assessments that require a tutor's review and action.
   - The list of assignments can be filtered by user name, exercise name, course or unit name.
   - Each line represents a single assignment for an individual user. It is likely that each user progressing through a course will complete many assignments requiring assessment.



- Click on the 'Results Report' button next to a particular assignment to see a copy of the user's work for that assignment in pdf format. The pdf can be saved and/or printed.
- Click on the 'Assess' button to view the assessment criteria and proforma for that assignment (see sample image below). Each criteria can be selected as passed or not, and comments inserted in the associated boxes.

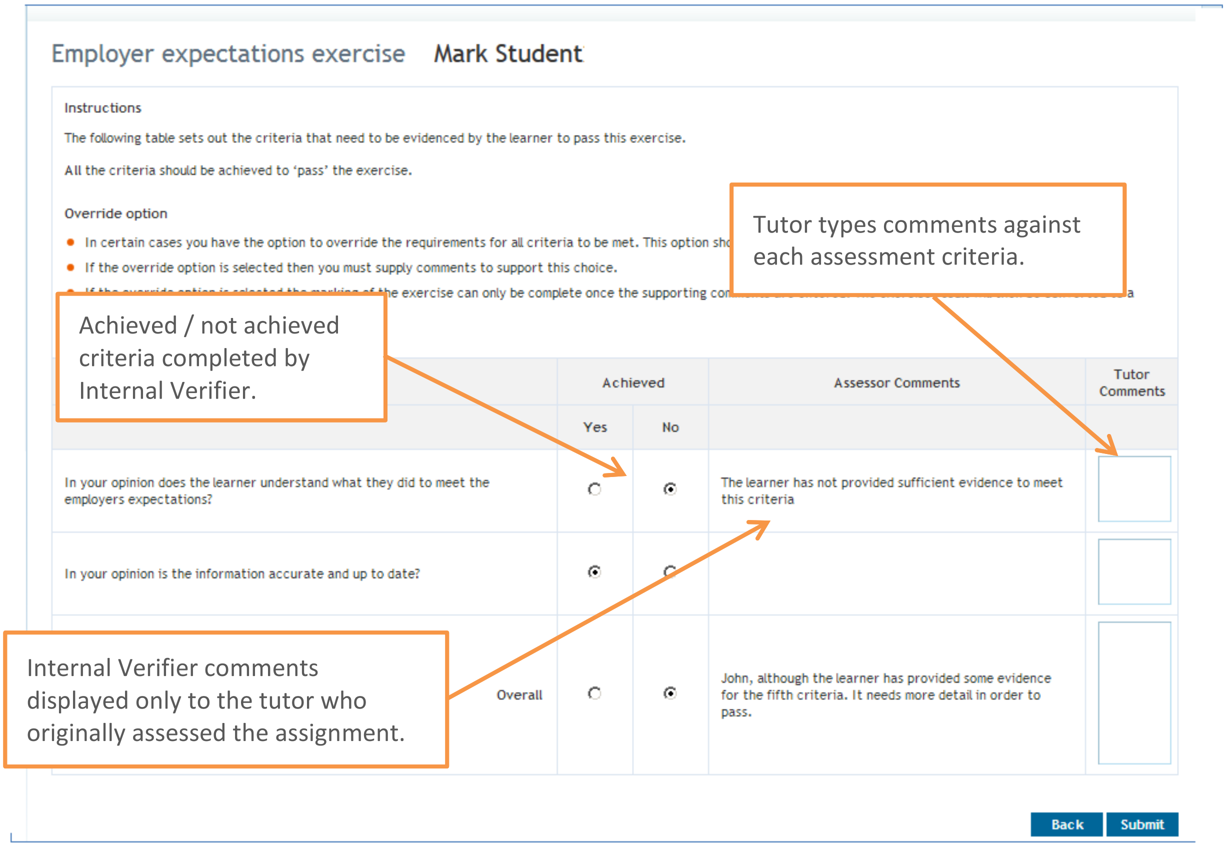


If the assignment is marked as not passed then the tutor comments are presented to the user the next time they use Aptem, and they need to attempt the assignment again.

Moderated assignments

Your organisation's Internal Verifier will be able to review assessment outcomes and are able to overturn assessment decisions whilst providing feedback to tutors. When an assignment previously assessed as 'achieved' is overturned by the Internal Verifier the user assignment will be visible as pending in the Outstanding Approvals page.

The tutor who originally assessed the assignment will be presented with an adapted assessment proforma (see image below) which displays the verifier's comments. The comments are only visible to this tutor and are hidden from any other tutor or administrator who views this assessment page.

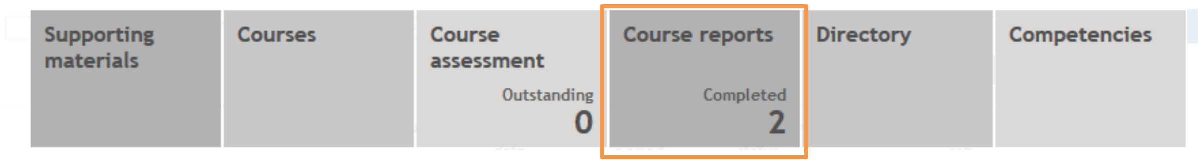


The tutor should follow the assessment process described above by entering their revised feedback comments which will be presented to the user the next time they use Aptem.

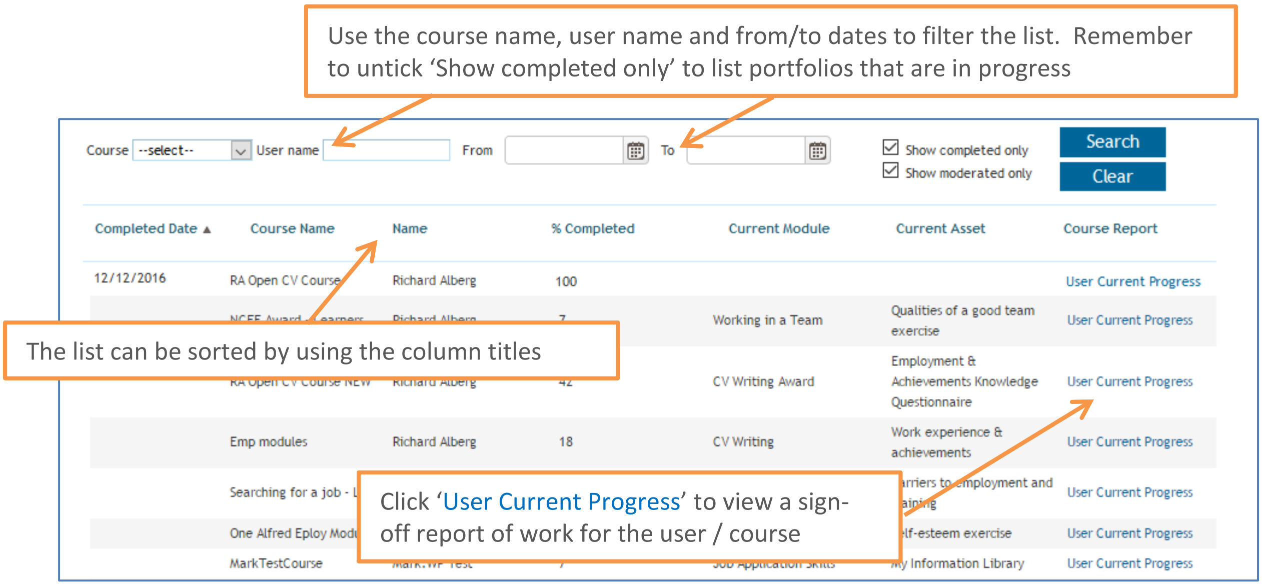
Unit sign-off documents and Course Reports

The Course Reports function provides access to detailed information on a user's progress through the employability courses. This includes links to view individual's unit sign-off documents for each course, regardless of whether the user has completed the course or is still in progress.

1. From the navigation panel click on the '*Course Reports*' tile.



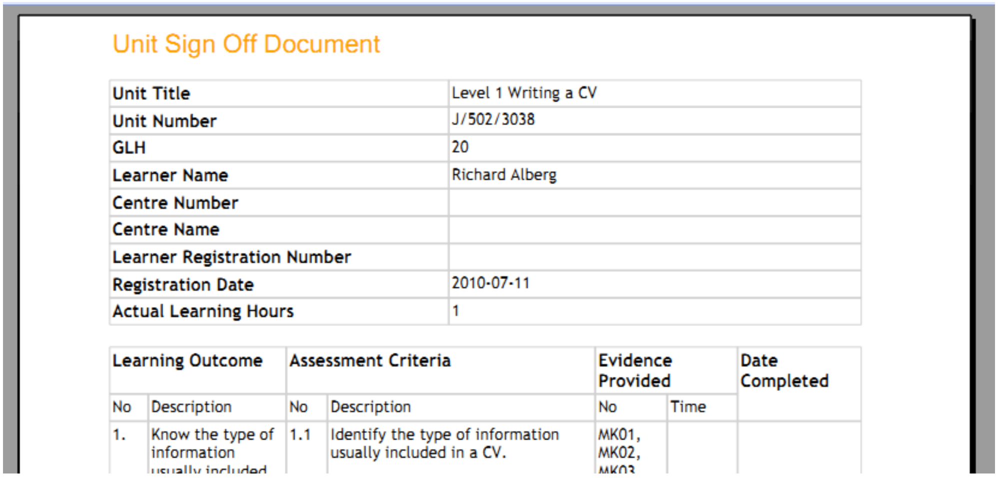
2. The Course Reports page lists each user and any courses they have taken.
   - The list can be sorted by name, course name and completion date by clicking on the relevant column titles.
   - The list can be filtered by course name (from the dropdown list of courses in the account), user name and completion date. Use the relevant filter item and then click the 'Search' button to update the list.
   - Click on the 'Clear' button and then the 'Search' button to view the original list.



3. The Course Reports list can also be filtered to view those assignments assessed by you which have subsequently been moderated by your organisation's internal verifier. Just tick the 'Show moderated only' option then click the 'Search' button. You will only be able to view moderation comments for assignments you have assessed and not those for other tutors.

4. To view a unit sign off documents or a /portfolio of work that a user has produced for a particular course click on the relevant 'User Current Progress' link. The sign off report will be displayed in PDF format, which can be saved to your local computer.

In addition to the user’s assignments completed via the Aptem system the sign off report covers unit information such as learning outcomes, assessment criteria, assessor comments and learning hours.



Unit Sign Off Document

Unit Title	Level 1 Writing a CV
Unit Number	J/502/3038
GLH	20
Learner Name	Richard Alberg
Centre Number	
Centre Name	
Learner Registration Number	
Registration Date	2010-07-11
Actual Learning Hours	1

Learning Outcome		**Assessment Criteria**		**Evidence Provided**		**Date Completed**
No	Description	No	Description	No	Time	
1.	Know the type of information usually included	1.1	Identify the type of information usually included in a CV.	MK01, MK02, MK03		

The sign off report can be saved for future reference.

Viewing completed course reports for an individual user

In addition, all course reports for an individual user can be accessed from the Course Progress section of their individual user profile page – refer to the section User Profile Report.

Employer/Organisation Management System

The Aptem Employer/Organisation Management System can be used to manage employers and associated work placements, but also training provider opportunities, referral partners and managed jobs.

This chapter explains how to create and manage work experience placements within Aptem. Work placement management within Aptem includes timesheet functionality where users on work experience complete an online timecard which is then verified by the employer providing the placement. This functionality can also be used to manage external courses and training placements to which users can be allocated and attendance monitored.

Depending on the features available in your administrator account Aptem can be used to:

1. Manage contacts and monitor activity with employers, training providers and partners:
   - Manage contacts within an employer/organisation
   - Track activity and communications with an employer/organisation – in order to effectively manage the employer/provider relationship.
   - Provide an audit trail of edits to the employer/organisation record.

2. Manage work experience placements, temporary vacancies and external course placements, such as:
   - Create work experience placements (or external course placements) which are available to users within your organisation's account.
   - Allocate individual users to a placement.
   - Monitor progress, and verify placement hours completed by users.
   - Administer an internal application progress where users can search for and then apply for placements. These applications can be reviewed, interviews scheduled, accepted or rejected.

It is important to note that managing work placements involves the process shown below. Depending on your administrator account permissions you may not have access to the whole process.

Create Organisation record (Organisations tile)	→	Create Work Placement. (Placements tile)	→	Enrol users onto work placements

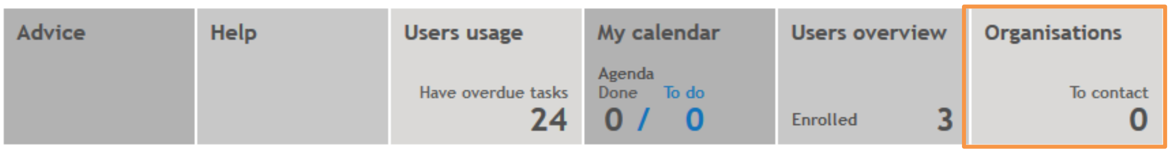
In addition Aptem contains a Work Placement application system which if enabled for your organisation's account allows an application process to be applied to each placement. Aptem users in your account can then search for and apply to suitable placements. See the section Work Placement Finder/Management System for more details.

Creating and Editing an Organisation Record

You may create an organisation record if this function has been enabled for your account. If you wish to add work placements for a new organisation you must first create a record for the organisation.

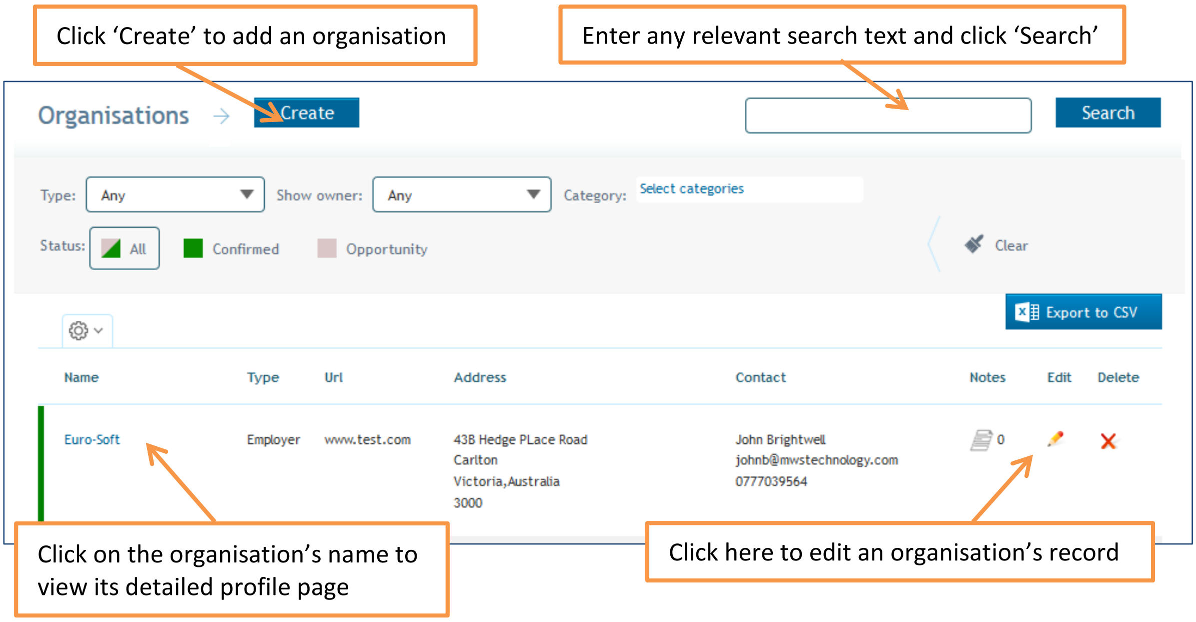
Adding an organisation

1. Sign in to your administrator account. Click on the Organisations tile

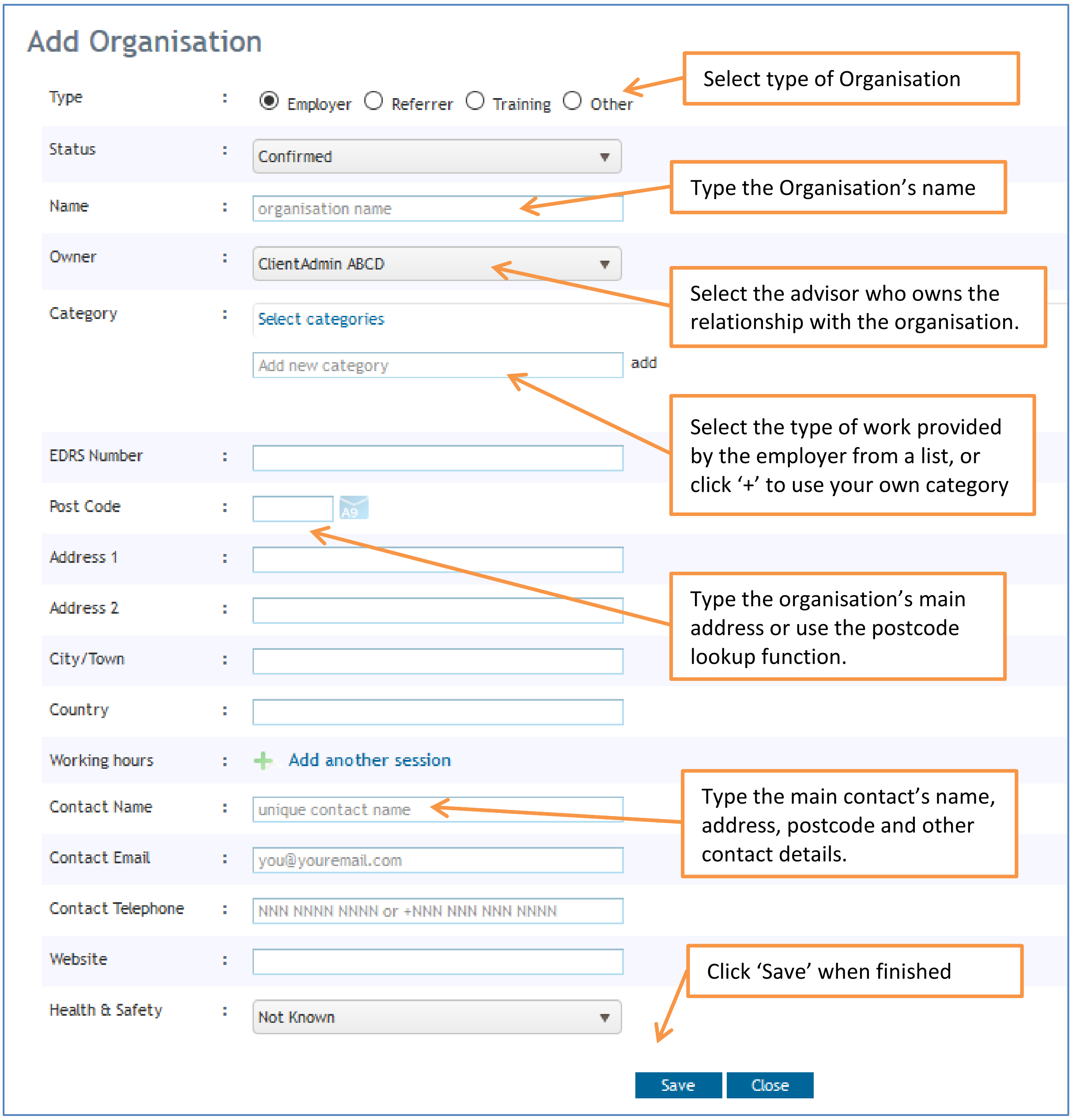


2. The Organisations report will be displayed. This page displays the main details for all employers, referral partners and training providers etc. that have been added to your organisation's account.

   - The page has links to add new organisations, view details on a particular organisation or edit the details of an existing organisation record.
   - Use the "Export to CSV" link to save list of organisations and their primary address/ contact details to a file that can be viewed in Microsoft Excel or similar.



3. Click on 'Create' to add a new employer/ organisation. The 'Add Organisation' page will be displayed.



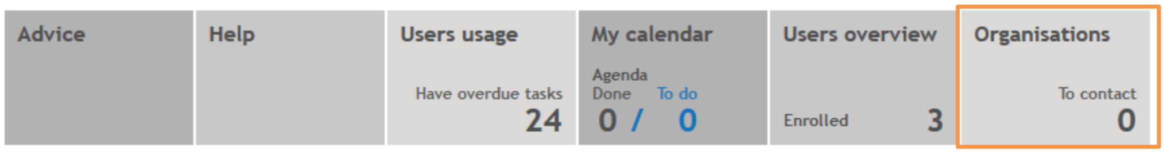
4. Select the type of organisation: Employer (an organisation that provides training or work placements), Referrer (an organisation that refers users to you), Training (apprenticeship or other training provider) or Other.

5. Complete the relevant details for the organisation: including the primary address and name, email and telephone number of the main contact person at the organisation.

6. If applicable enter the Organisation's Employer Data Service Reference number provided by the Skills Funding Agency. Next click on "Save", the organisation's record will now be available in the Organisations report. Work placements can now be created for this organisation (refer to the section [creating a new work placement]).

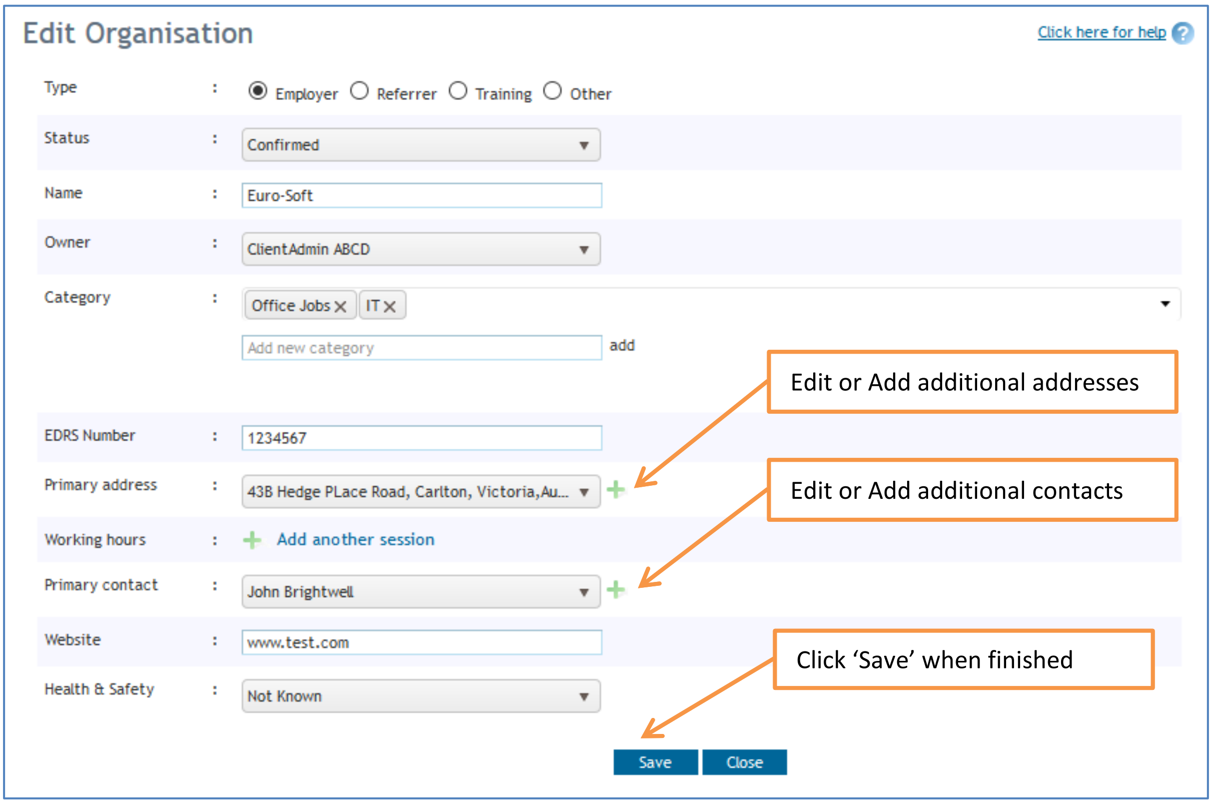
Editing an organisation

1. Sign in to your administrator account. Click on the Organisations tile.



2. The Organisations report will be displayed. If needed the list of organisations can be filtered by 'owner', 'group' or status. Alternatively type a relevant search term, such as organisation name, location, contact etc., into the search box and click 'Search'.

3. Click on the relevant pencil (edit) icon for the existing organisation to display the Edit Organisation page.



4. The following changes can be made:

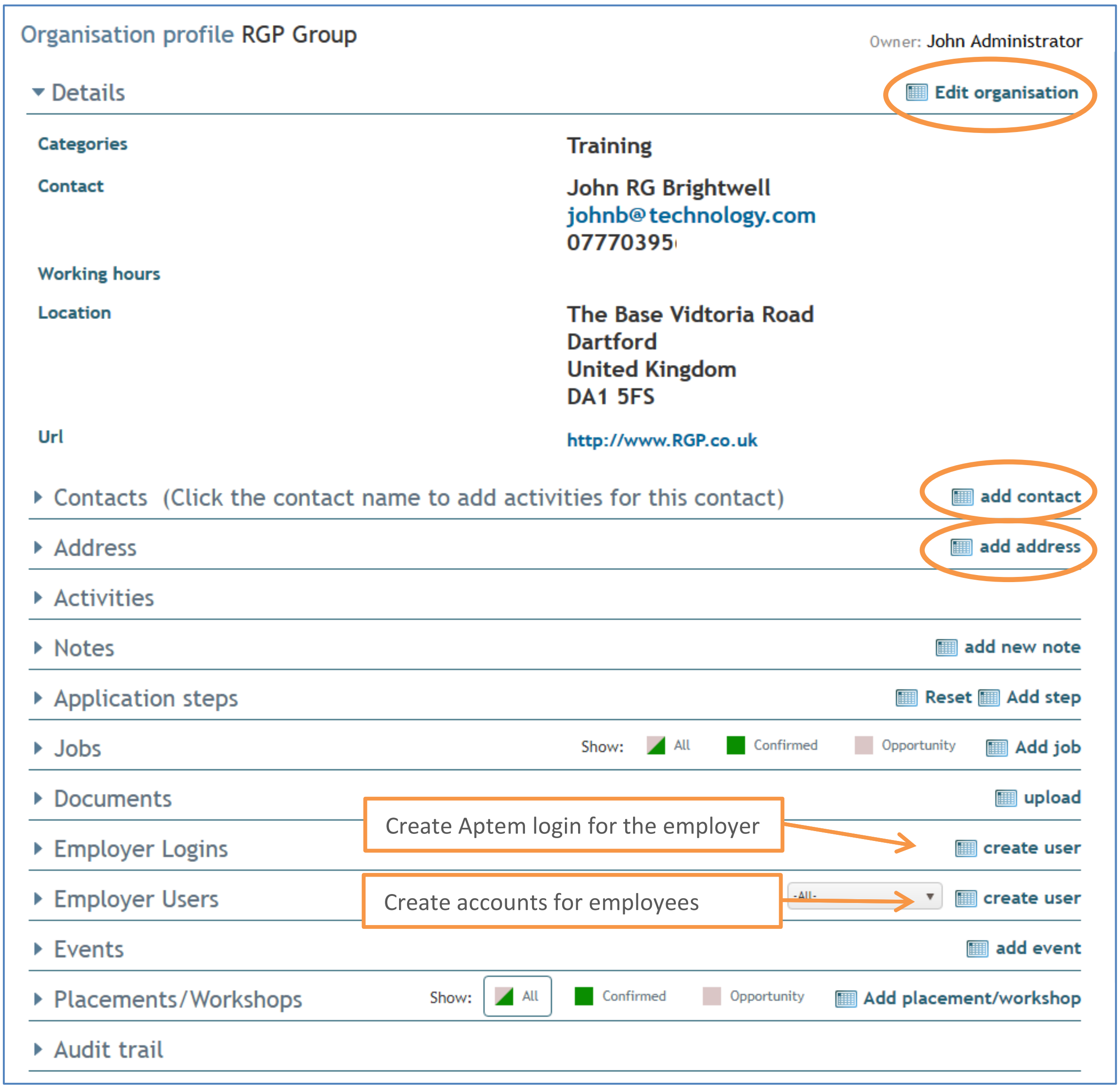
    a. Change the organisation type
    b. Add/remove the categories assigned to the organisation.
    c. Add additional locations and addresses for the organisation.
    d. Add additional contact names including their email address, telephone, address, and job title.

5. Click on 'Save' when finished updating the organisation's details.

The Organisation/Employer Profile

Clicking on an organisation's name in Organisations Report will display the Organisation Profile page for that employer/provider. This report provides information, with links if enabled for your account to add or amend the following:

- Address details for the organisation, including multiple locations where placements etc. are occur at multiple sites.
- Contact details for organisation, including multiple individuals.
- Options to review and amend the optional application process for selecting candidates for placements
- A summary of managed jobs and placements.
- A history of activity and communication with individuals at the organisation.
- Add existing employees of the organisation as users e.g. to complete an apprenticeship programme.
- Add employer contacts as Employer Admins so they can login and check progress of employees.
- An audit trail of changes to the organisation's profile within Aptem.



Recording activity with a contact at the organisation/employer

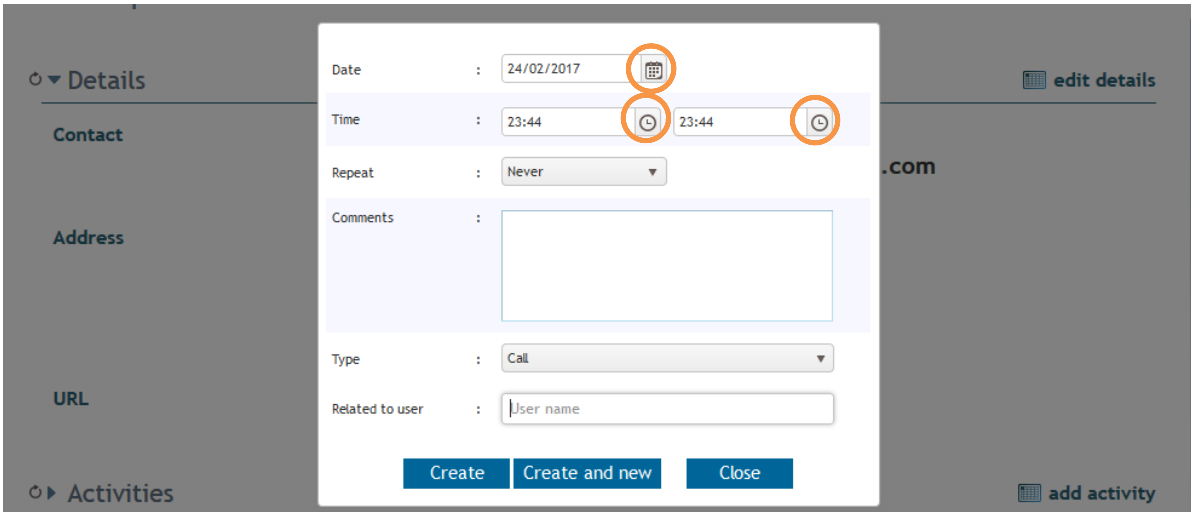
The Activities section of the Organisation Profile lists all recorded activity with contacts from the organisation, such as telephone calls, meetings, and status updates etc.

- Clicking on the relevant pencil icon will allow an existing record of an activity to be edited.
- Clicking on the relevant 'X' item will delete an activity record.

Each activity is recorded against an individual contact. A new record can be added as follows:

1. In the Contacts section of the Organisation Profile click on the contacts name to view their profile.

- In the Contact profile click on the 'Add activity' link and complete the details in the displayed screen.



- The date and time fields will display the current time and date by default. Click on the relevant calendar and clock buttons to change the time/date. For example, to record an activity in the past or schedule a future activity.
- Add comments to describe the activity and select the type from the dropdown list of 'Call', 'Meeting' or 'Email'.

- Click ‘Create’ to save the activity or click ‘Create and new’ if you wish to record this activity and schedule a follow up activity.

All activities entered through this screen will be visible in the administrator’s task list and calendar. They will also be visible to other administrators who can see the organisation in their account.

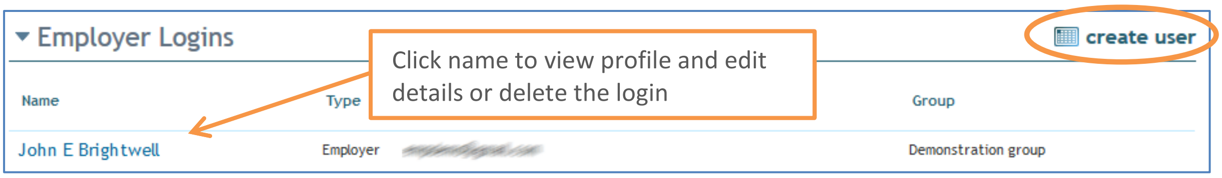
Creating and deleting Aptem logins for employer contacts

The Employer Logins section of the Organisation Profile lists the organisation’s contacts who have been provided with an Aptem login. These ‘Employer Account’ allow the contact to:

- View candidates for their placements and managed jobs,
- Add/edit their own placements and jobs
- Add/update contact details and organisation addresses.
- Upload relevant documents such as employer liability insurance or training policies
- View the learning plan progress of existing employees, for example, who are completing an apprenticeship.

Employer Accounts only have access to information stored within their own Organisation Profile and no other information with Aptem. A separate guide is available for Employer administrator accounts, please contact the Aptem Support Team on 020 7870 1000.

The Employer Logins section of the Organisation Profile can be used to review the contact details of each employer account.

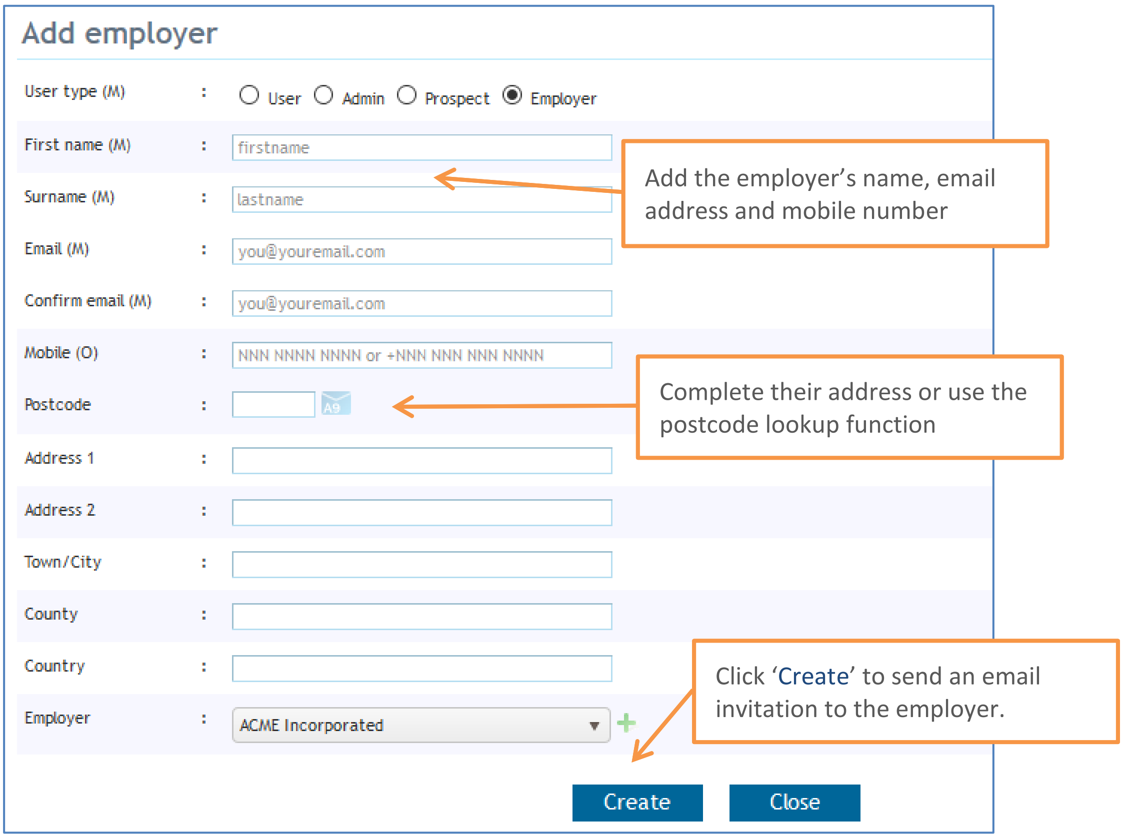


Editing or deleting an employer login

In the Employer login section click on the name of an employer contact to view their profile page, which can then be used to edit contact details or remove the contact’s employer login account.

Creating a new employer login

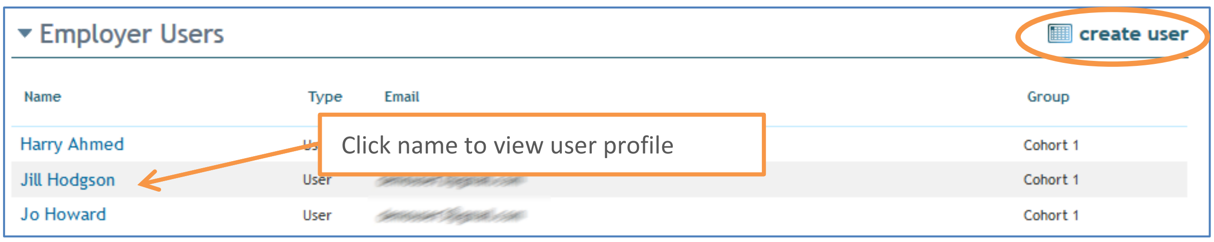
1. In the Employer Logins section of the Organisation Profile click on the create user link to add a login for an employer contact.
   The Add Employer user page will be displayed. This page is similar to the add user page (see section Method 2: Create an account for an individual user). Complete all relevant details and click the 'Create' button.



2. The employer contact will receive an activation email enabling them to set a password and sign into Aptem.

Creating and reviewing Employer users

Users can be directly associated with an organisation, for example where an organisation's existing employers are enrolled onto an apprenticeship scheme. These users will be listed in the Employer Users section of the Organisation Profile.



As an Aptem administrator you can view the detailed user profile (see section User Profile Report) by clicking on the user's name. Employees can be added as users by clicking on the 'Create User' link this will display the create user page (see section Method 2: Create an account for an individual user). When completed the employee will receive an invitation email to activate their Aptem account.

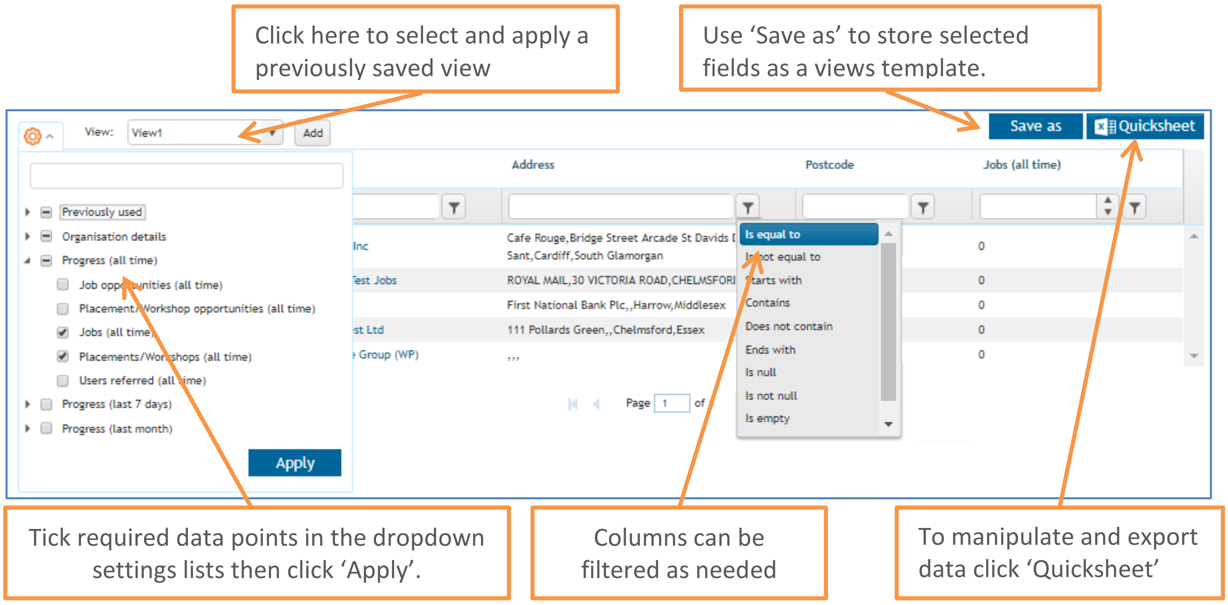
Custom organisation reports and data export

For tracking purposes your organisation may wish to create custom reports on the data stored within Aptem's organisation and employer CRM feature.

Bespoke reports can be saved as templates and re-run as required, for example to keep tracked of how many placements have been filled or to create a current record of organisational contacts to import into your preferred email software such as MS Outlook. The data can be saved in CSV file format which can be viewed in Microsoft Excel or similar, or for contact details can be imported into MS Outlook etc.

Click on the "***Organisations Generic Report***" tile in the navigation panel.

Data points can be selected from a dropdown list covering all information collected by Aptem. A column is then created for each data point. The data can be sorted and filtered by clicking on the relevant column header.



Once the relevant data fields have been chosen the report view can be saved by clicking on 'Save as'. Remember to click the 'shared' tick box if you wish other Aptem administrators from your organisation to also access and use the report template.

Managing Placements and Workshops

Creating and Editing Placements or Workshops

You may create work placements if this function has been enabled for your account.

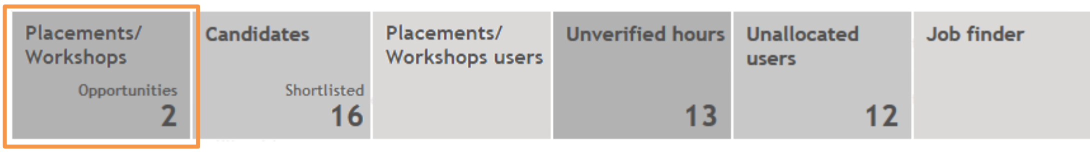
- A placement/ workshop can be used to refer to work experience, industrial experience, a training workshop, temporary work or even a place on an external course.
- The system is designed to allow the creation of multiple placement/workshop positions at a particular organisation for a given time period. Users can be enrolled onto the placements until all available positions are filled.
- If an organisation is offering different types of work experience e.g. warehouse and office work, then separate placements should be created for each category of work.
- If an organisation offers placements or workshops in different time periods, it is recommended that a new placement is created for each time period. For example if an organisation offers a two week placement in January and another two week placement in March.

Creating a new work placement / workshop

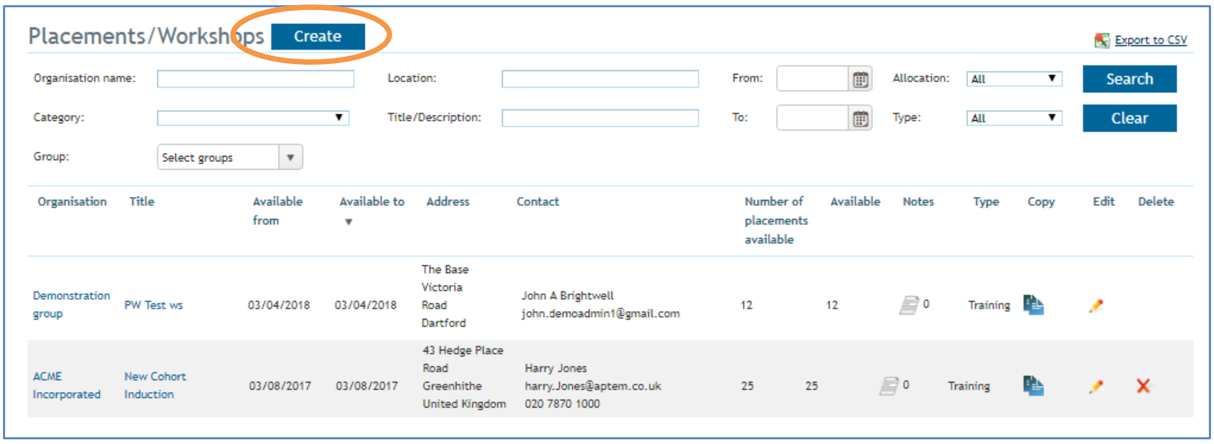
Remember if you are adding a placement or workshop for a new organisation you must first create a record for that organisation. Refer to the section [Creating and Editing an Organisation Record](#) above.

A new placement can either be created by clicking on the 'Add Placement/Workshop' link in the Organisation's Profile page or from the main Placements/Workshops page.

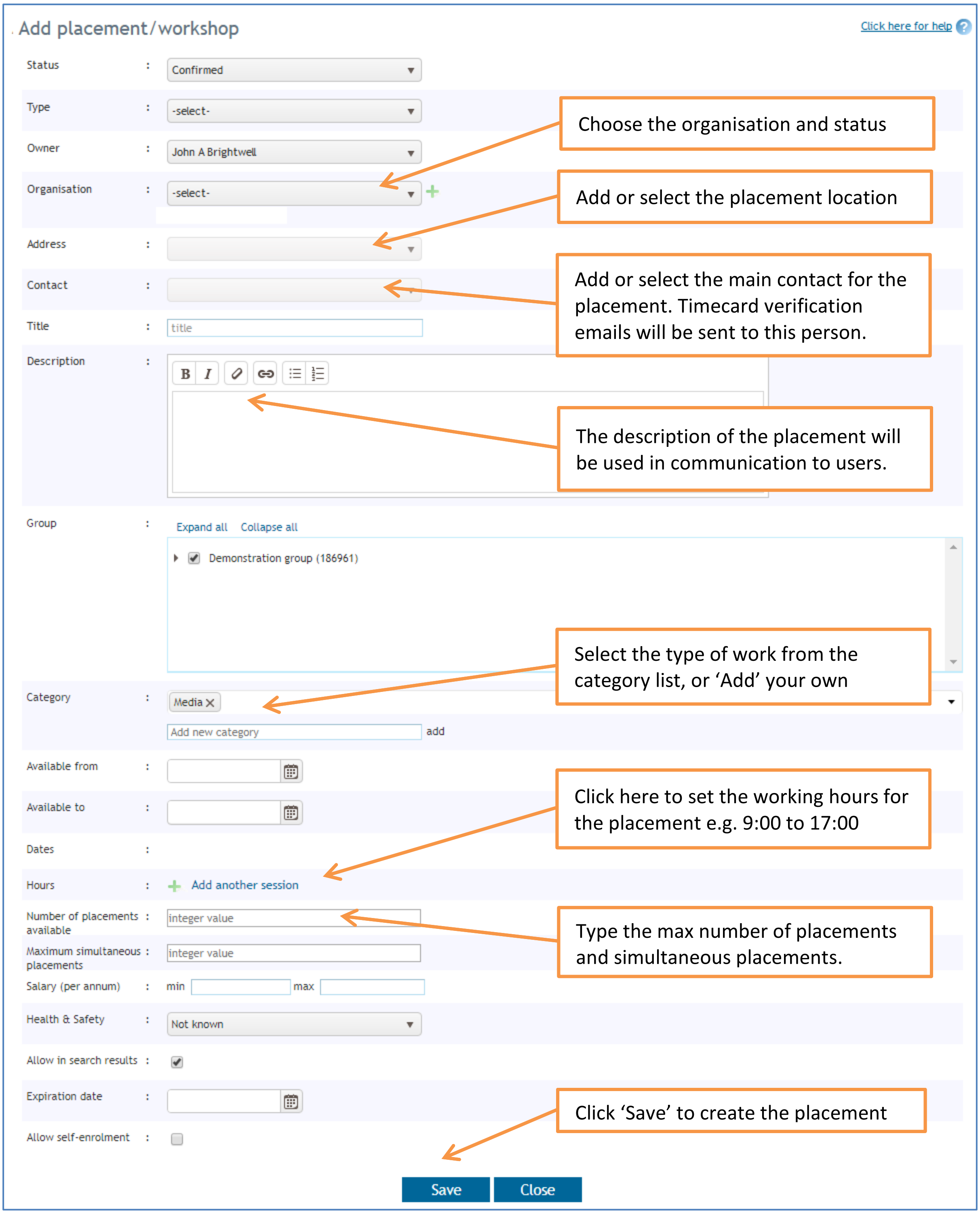
1. Sign in to your administrator account. In the navigation panel click on the 'Placements/Workshops' tile.



2. The 'Placements/Workshops' page will be displayed.



3. Click on the create button, the 'Add Placement/Workshops' page will be displayed.



In the 'Add Placement/Workshops' page:

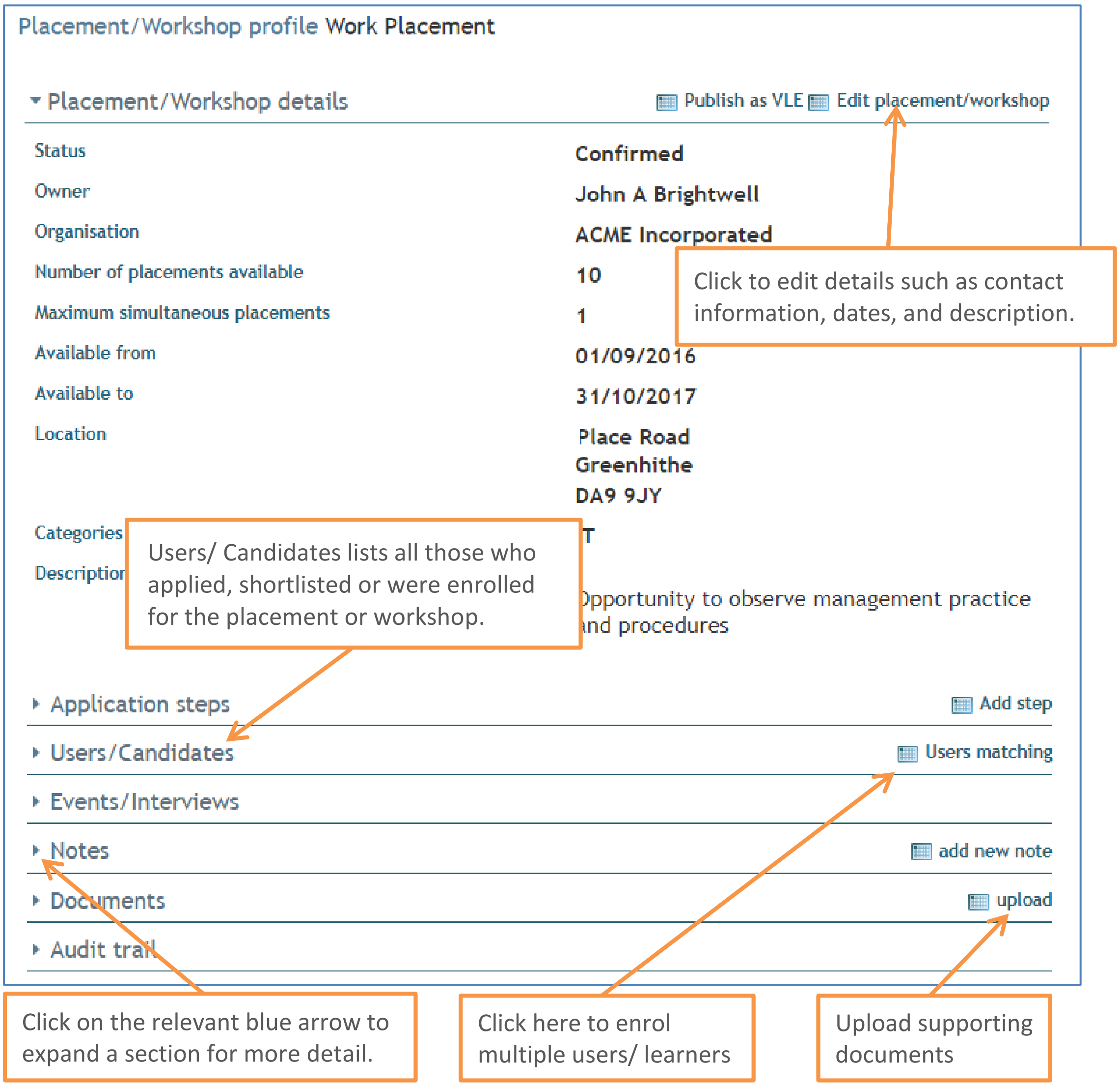
a. Select the status of the placement, either 'confirmed' or 'opportunity'. Note that users can only be enrolled onto 'confirmed' placements.
b. Choose the type of the placement options include: Training, Vacancy, Work experience, Work related project.

c. Choose the organisation from the dropdown list. If the organisation name is not there then a new organisation record needs to be created first by clicking on the '+' icon.
d. Select the location and organisational contact name for the placement or add new details as required.
e. Type or copy the title and description of the placement. The description can be formatted and will be used in emails and users task lists.
f. Choose the placement's category of work from the predefined dropdown list, or click on '+Add' to use your own category. Any categories that you define will be available when you create another placement. These categories can be used by administrators and/or users to search for placements.
g. Set the start and end dates for the placement availability. For example if the organisation provides 2 week placements throughout the academic year then use the start and end dates for this time period. Click on the '*Add recurrent*' button to select specific days per week/month etc. for the placement.
h. Complete the working hours for the placement. Separate sessions during the day, such as morning and afternoon excluding a lunch break can be accounted for. Click on '+Add another session' to set the hours for example the morning and then click this link again to set the hours for the afternoon. The provider/employer will be able to verify that a user has completed these hours while on placement.
i. Select the relevant contact person for the placement or click '+' to create a new contact for the placement. Timecard verification emails will be sent to the email address stored for this person. If an organisation offers multiple placements in different departments each with their own contact then it is recommended to create separate placements for each.
j. Enter the maximum number of positions available for the placement. Multiple users can be enrolled onto a placement simultaneously. Use the 'maximum simultaneous' box to limit how many people can be assigned to the placement during the same time period.
k. Select Health and Safety status – for example to confirm that any appropriate safety checks have been completed, otherwise users cannot be enrolled on the placement.
l. Finally click "Save" to create the placement. The placement details and current status will be visible in the Placements page.

The Placement / Workshop profile report

The details of a placement/workshop can be reviewed and edited from its profile page. The profile page for a placement/workshop can be accessed by clicking on the placement or workshop title from the Placements/Workshops report, or the placements/workshop section within an organisation's, individual user's or group's profile page.

The profile page lists all details for a placement/workshop including, contact details, timings, date availability, assigned users, application process (if applicable) and relevant documentation e.g. pre-workshop or placement reading material.

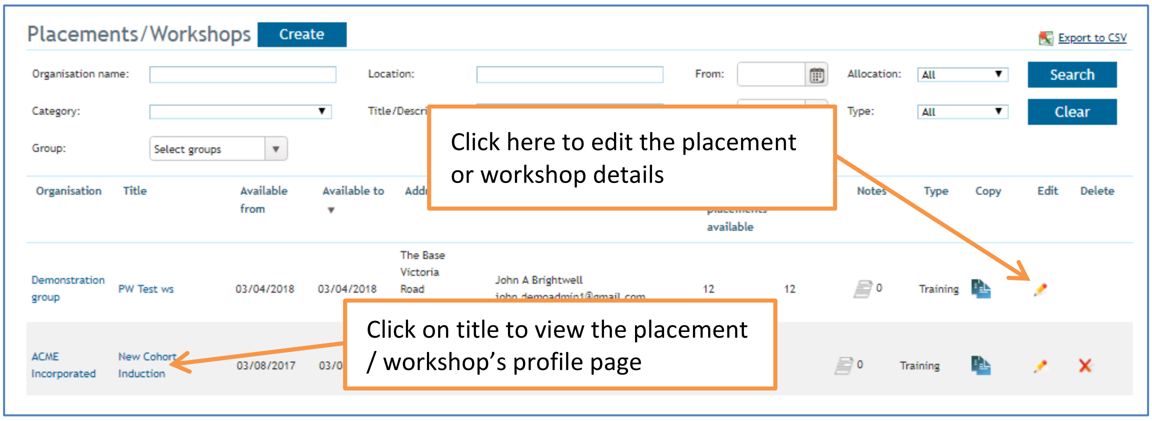


Editing an existing placement / workshop

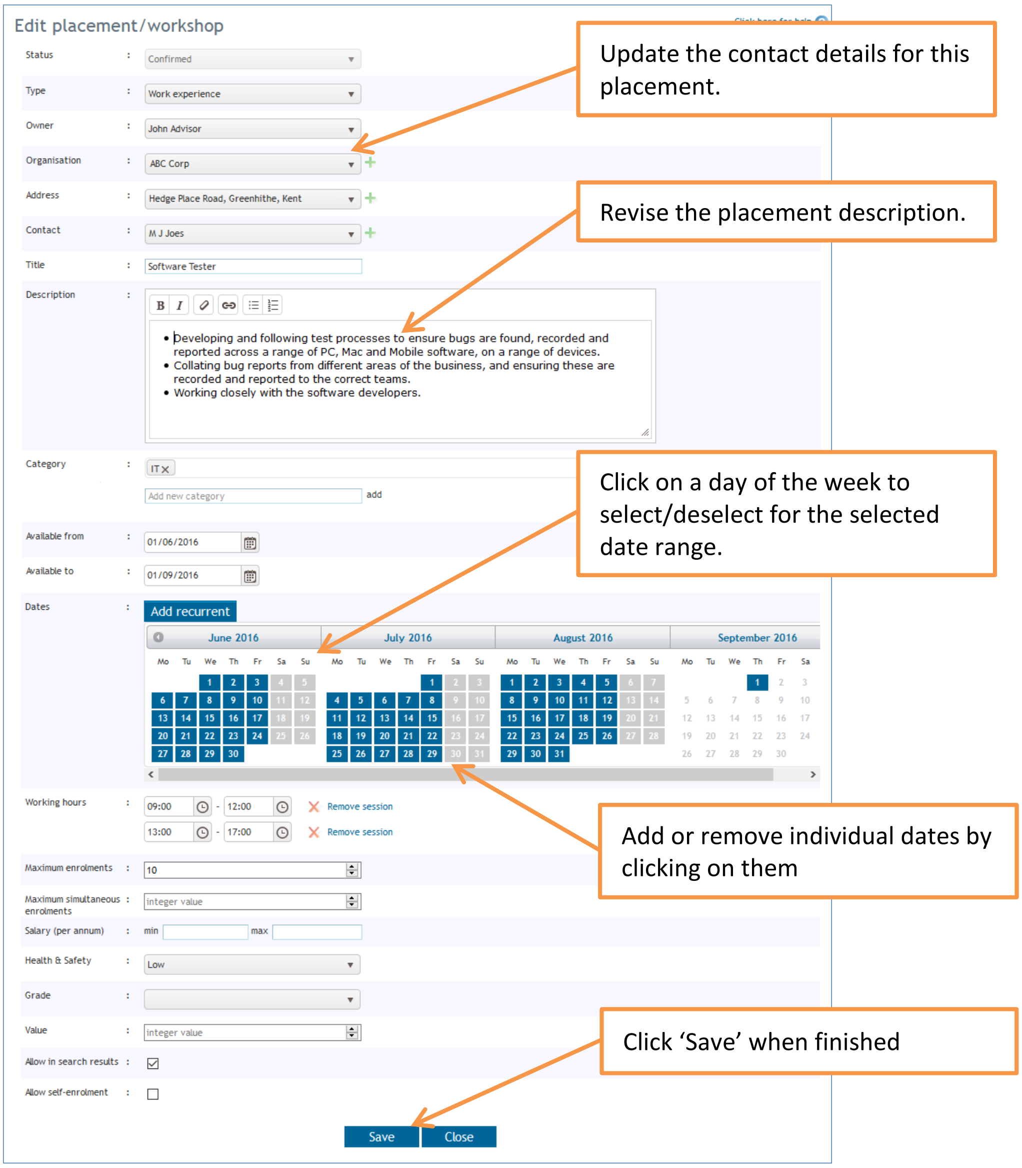
1. Sign in to your administrator account. In the navigation panel click on the ‘Placements/ Workshops’ tile.

2. The ‘Placements/Workshops’ page will be displayed.

   The Placements/ Workshop page lists all placements and workshops within your account, displaying the Organisation name, start and end date and the number of filled positions compared to the number provided by the organisation. If needed, use the filters to search for a particular placement by employer name, work category, description and/or location, by completing the relevant information and clicking on the search button.



3. Click on the relevant 'edit' icon to amend the details for a particular work placement. The Edit Work Placement page will be displayed. All relevant details such as the placement location, contact details, session times and allocated dates can be edited.



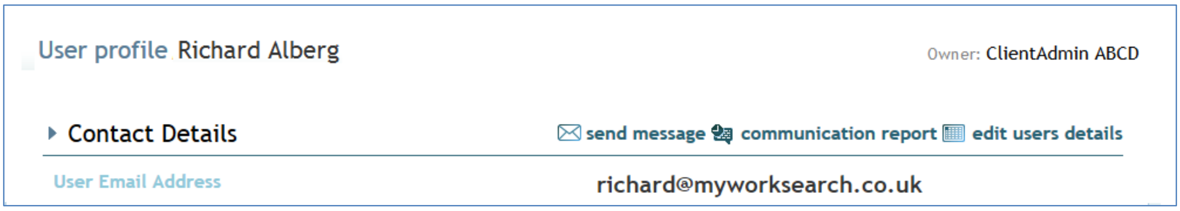
4. Amend the relevant information on this page then click on 'Save' to store any changes.

Enrolling an individual onto a placement/ workshop

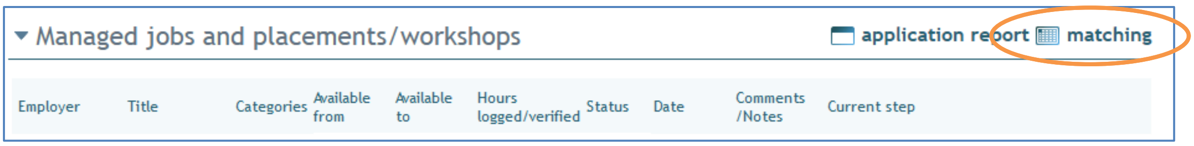
You may enrol users onto placements if this function has been enabled for your account. In some organisations this function is separate from creating placements.

1. Sign in to your administrator account. In the navigation panel click on the **Users** tile to view the Users report page.

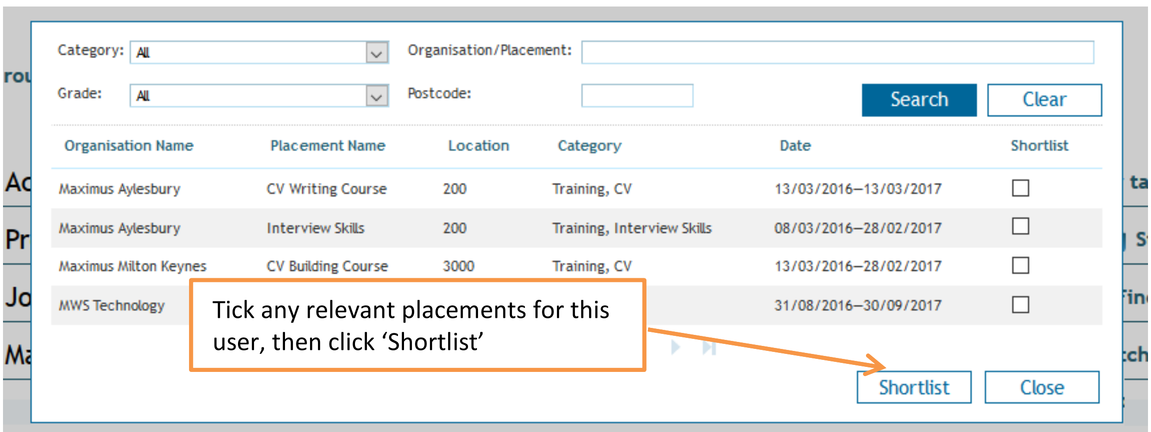
2. Search for the user who you wish to enrol and click on their name to view their individual profile report.



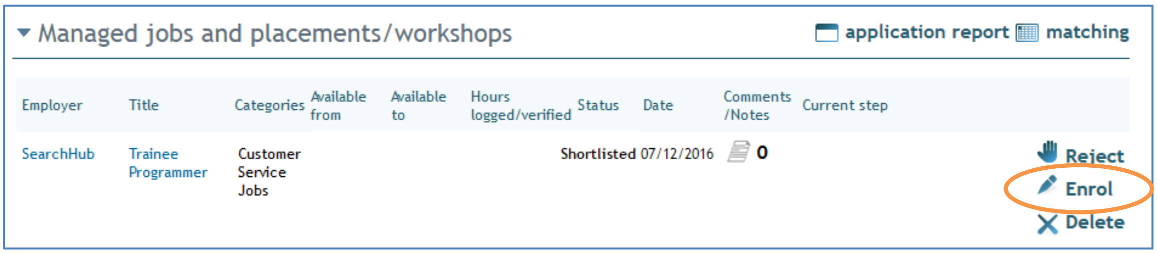
Scroll down the individual profile to the Work Experience section, and click on 'matching'.



3. The 'matching' screen will be displayed.
   By default this window shows all available work experience placements within 10 miles of the user's postcode. The list can be filtered by using the work category list then clicking on the 'search' button. Click on the 'clear' button to remove the distance criteria and show all available placements currently available in your account. Select relevant placements then click 'Shortlist'.

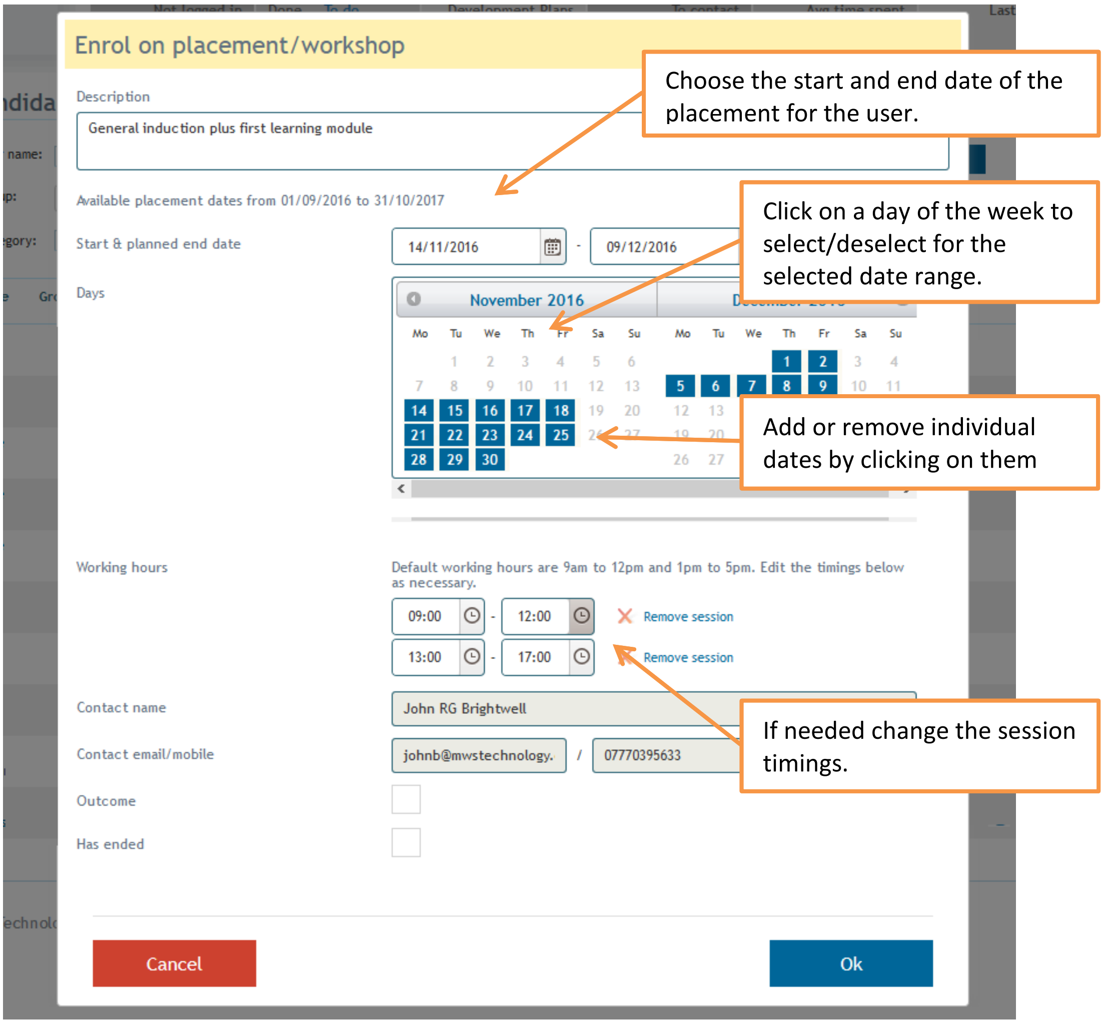


4. The Managed Jobs and placements/workshops section of the individual's profile will be updated.



This profile section displays the status of all placements for that user. Where a user has completed an application process for a placement the status will be 'Applied' rather than 'Shortlisted'. Next click on 'Enrol'.

5. The 'Enrol' screen will be displayed.



This screen allows the creation of a placement for the selected Aptem user:

a. Click on the calendar icons to choose the start and end date. The screen will automatically update displaying a calendar of the dates selected.

The days allocated to the work placement are highlighted in blue. By default this includes all Mondays to Fridays.

Individual days can be removed or added (e.g. a Saturday) by clicking on the relevant date.

Particular days in every week (e.g. Fridays) can be included or excluded. Click on the day of week in the calendar header to select/deselect that day for the chosen date range. For example if the user's placement is Monday to Thursday each week, then clicking on "Fr" in the calendar will deselect all Fridays.

b. The default working hours for the placement will be displayed. These can be edited if needed.
c. The default contact details for the placement can be amended. Please note that timecard verification emails will be sent to the "contact email" address provided.
d. Click 'OK' to enrol the user onto the work placement. Aptem will automatically send an email to the user giving details of the work placement and reminding them to sign into their account.

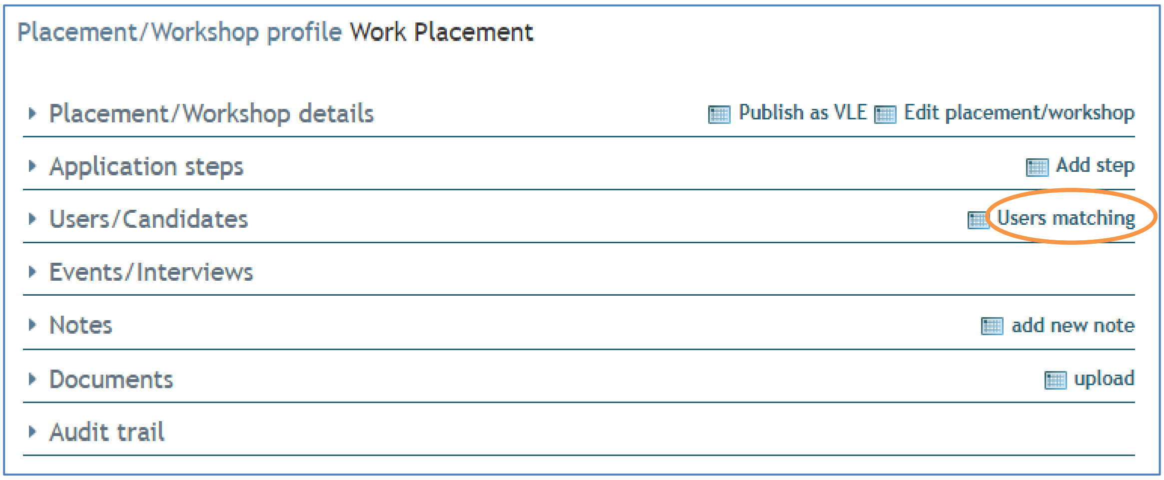
Enrolling a group onto a placement / workshop

A group of users can be enrolled on a placement if this function has been enabled for your account.

This feature allows all active users within a selected group to be enrolled into a specific workshop or training placement – if there are available spaces.

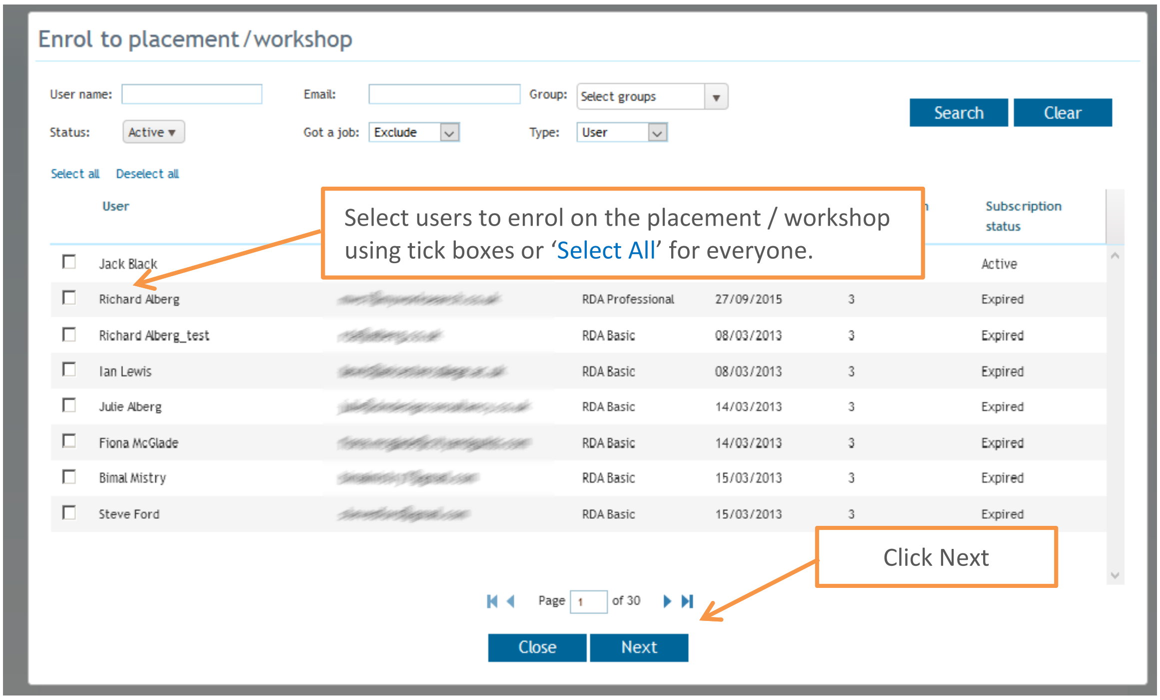
1. Sign in to your administrator account. In the navigation panel click on the 'Placements/ Workshops' tile.

2. The 'Placements/Workshops' page will be displayed. Next click on the title of the relevant placement or workshop to display its profile page.

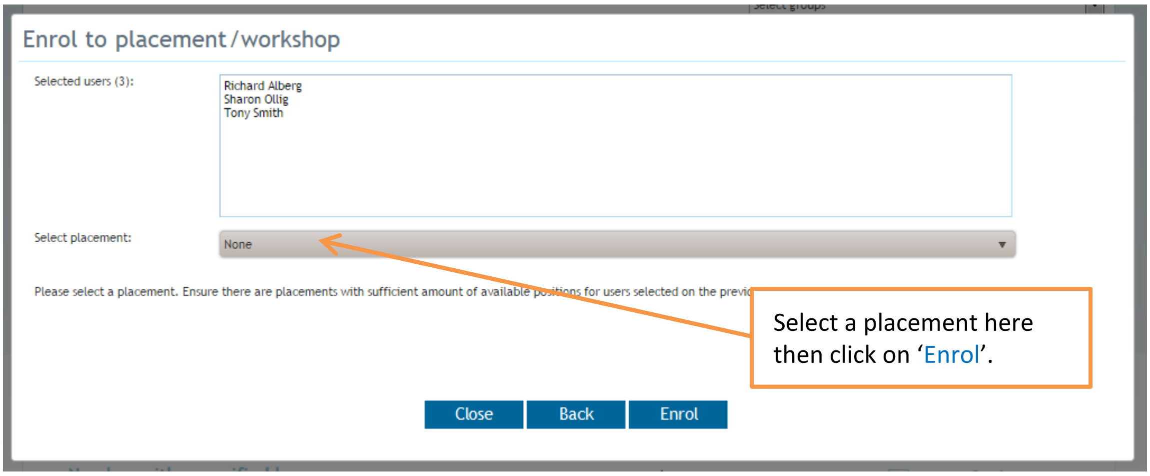


3. Scroll down to the Users/Candidates section of the workshop profile page and click on 'Users matching'.

4. The ‘Enrol to placement/workshop’ screen will be displayed. Use the tick boxes to select the users who will be allocated, then click ‘Next’.

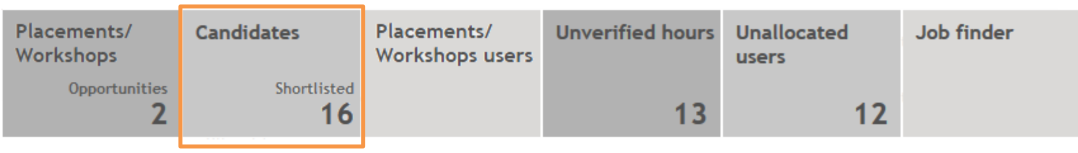


5. Then select the placement or workshop from the dropdown list. Then click on the ‘Enrol’ button.

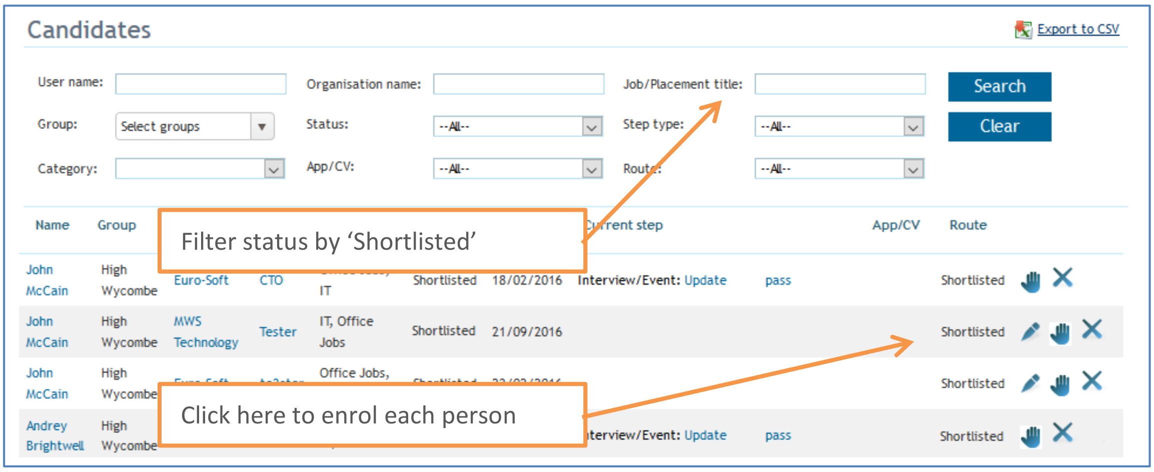


A message confirming that the selected individuals have been shortlisted for the chosen placement will be displayed.

6. Next in the navigation panel click on the ‘Candidates’ tile to display the Candidates page.



This page displays the list of people who have applied for or been shortlisted for any placements or workshops in your account. Filter the list for the relevant placement and then enrol each person using the steps described in the section Enrolling an individual onto a placement/ workshop.



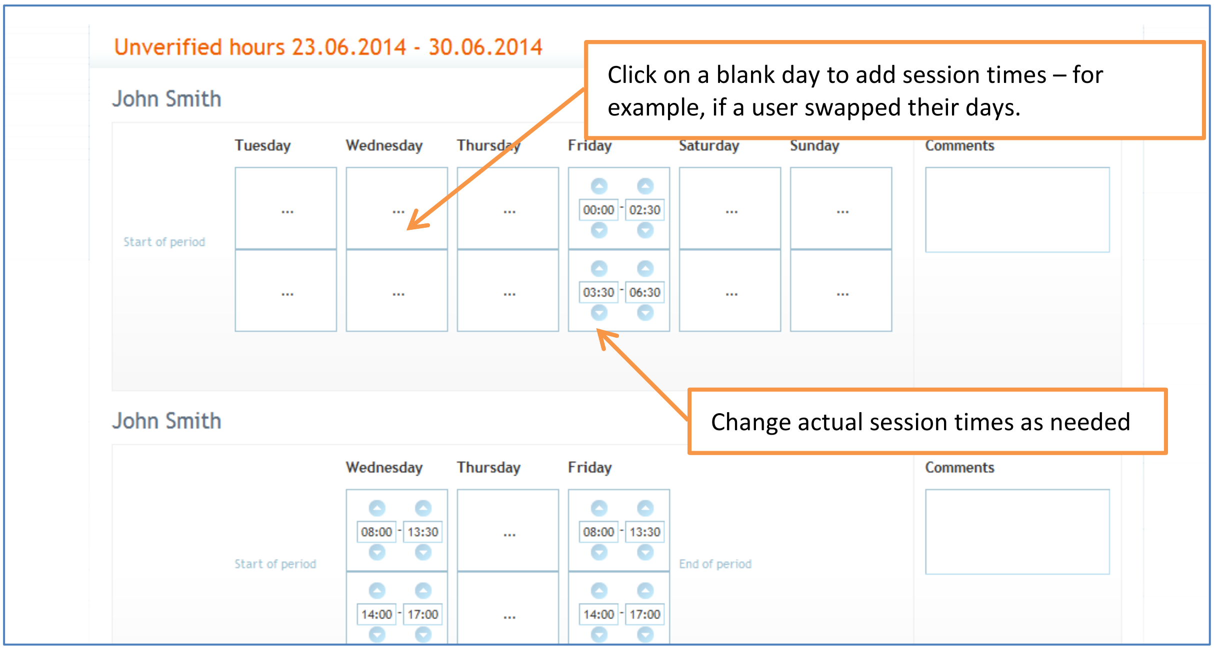
Work Experience Timecard functionality

At the end of each week an email is sent to the contact email address given for the employer of a work experience placement.

The employer/provider should click on the link to view a timecard form for the users completing a placement with them.

The employer can change any of the placement hours for a given day by adjusting the user's actual start and finish times for each session.

Once time periods given are correct then the employer clicks on the 'confirm' button at the bottom of the page to log the user's placement hours.



Monitoring workshops and training placements

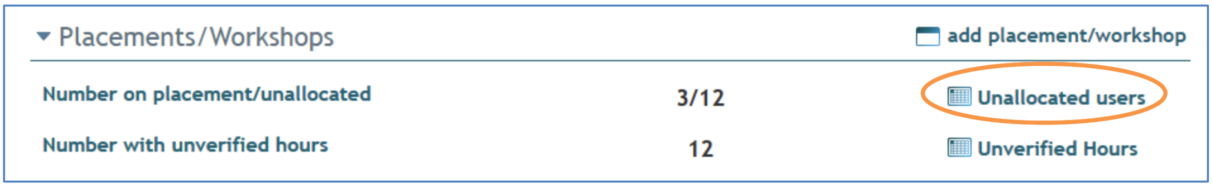
Administrators can easily monitor and track the progress of placements including:

- Reporting on which users have not completed a placement and allocating them to a placement.
- Checking and verifying placement timecards.
- Reporting on which users are allocated to a work or training placement.

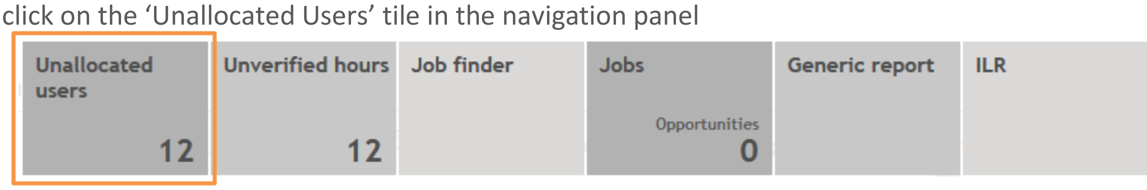
Finding users who have not completed a placement

The 'Unallocated Users' report lists all users in your account who have either not been allocated to a placement or have not completed a placement.

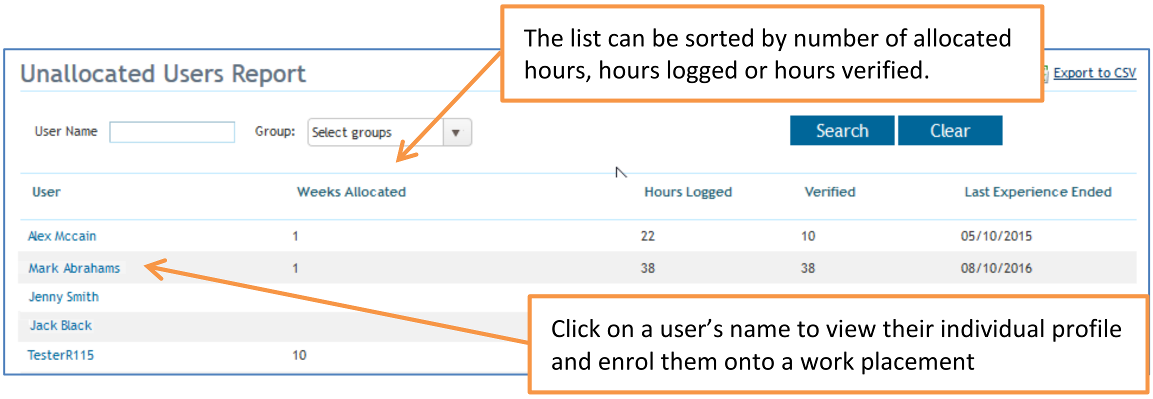
1. To view the Unallocated Users' Report either click on the 'Unallocated Users' link of the Work Placements section of the Users Group Profile, or



click on the 'Unallocated Users' tile in the navigation panel



2. The report can be filtered by individual group. Select the group name from the dropdown list and click on the 'Search' button. You can also search for an individual user by name.



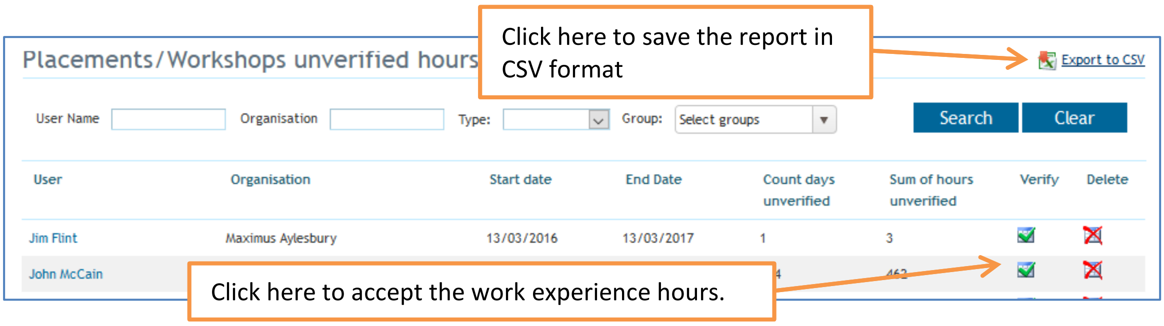
3. The report can be filtered by number of weeks allocated, number of hours logged or number of hours verified. For each user the relevant line will display the length of their placement and the number of hours currently logged.

Checking unverified time on a placement / workshop

The 'Unverified hours' report lists all placement hours, more than one week old that have not been verified. Please note that placement hours logged within the past six days are not shown. This allows time for users and employers to make corrections before the hours are verified.

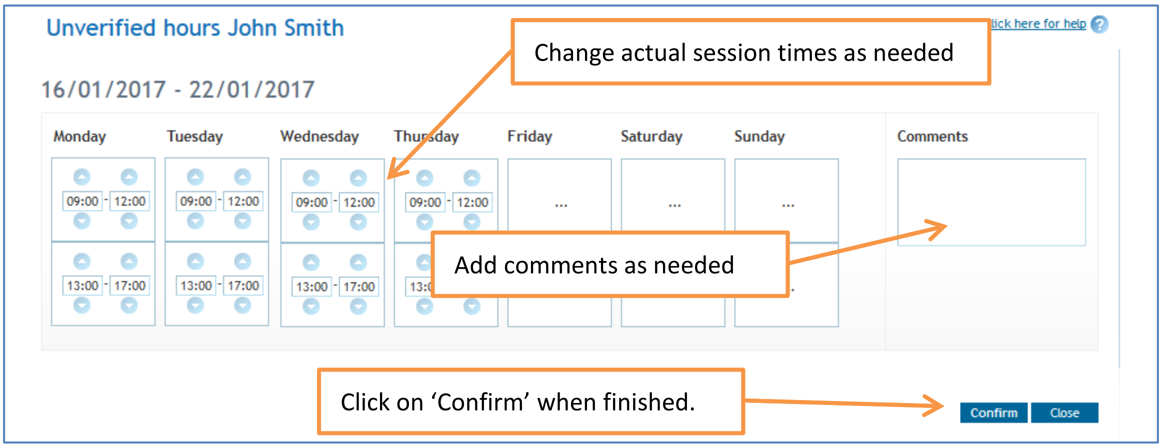
1. Click on the 'Unverified hours' tile in the navigation panel to view the Unverified Hours Report page.

2. Each line summarises a user/employer placement/ workshop combination. The list can be searched by group or user name, and can be sorted by clicking on the column titles.



Note: Use the 'Export to CSV' link to save a copy of the report in a format that can be used in Microsoft Excel or similar software.

3. Administrators can verify work experience hours on behalf of employers by clicking on the appropriate 'verify' icon. This will display the timecard for the user.

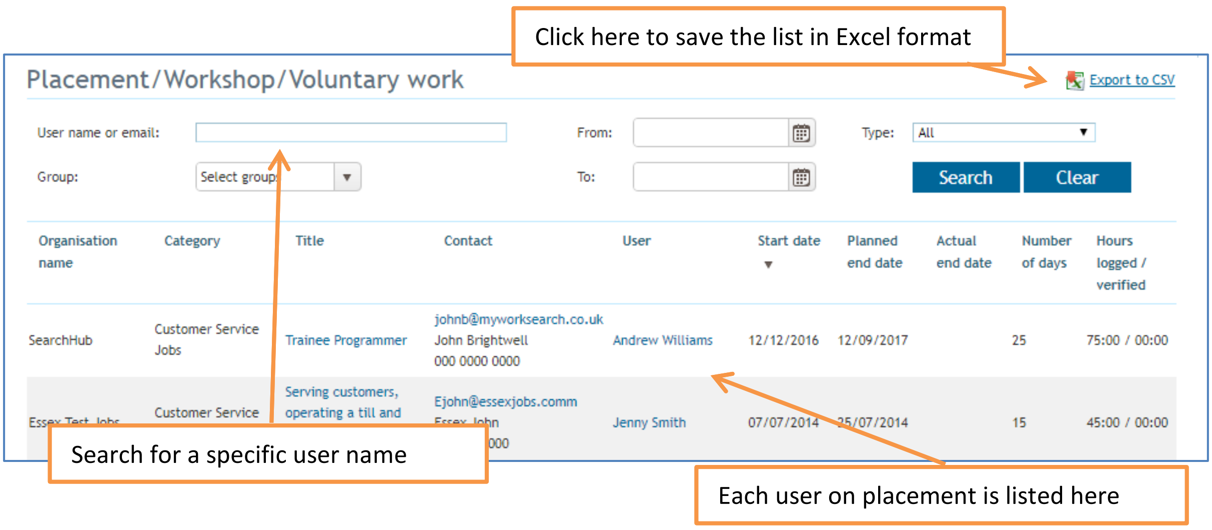


Viewing a list of users allocated to a placement / workshop

The 'Placements/ workshop ' report lists all users who have been allocated to a work placement, providing details such as: the employer name, placement description, contact details for the placement, and dates. This is a summary report and cannot be used to verify timecard hours.

1. To view the Work Placement report click on the '*Placements users*' tile in the navigation panel.

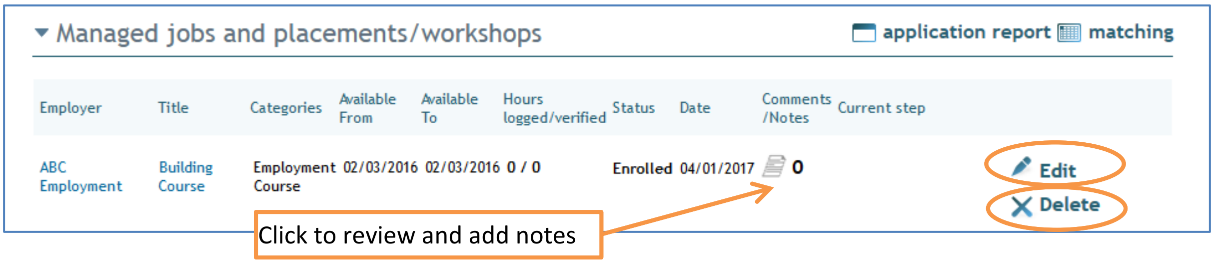
2. The list can be searched by group or user name.
3. Use the Export to CSV link to save a copy of the list in a format that can be used in Microsoft Excel or similar software.



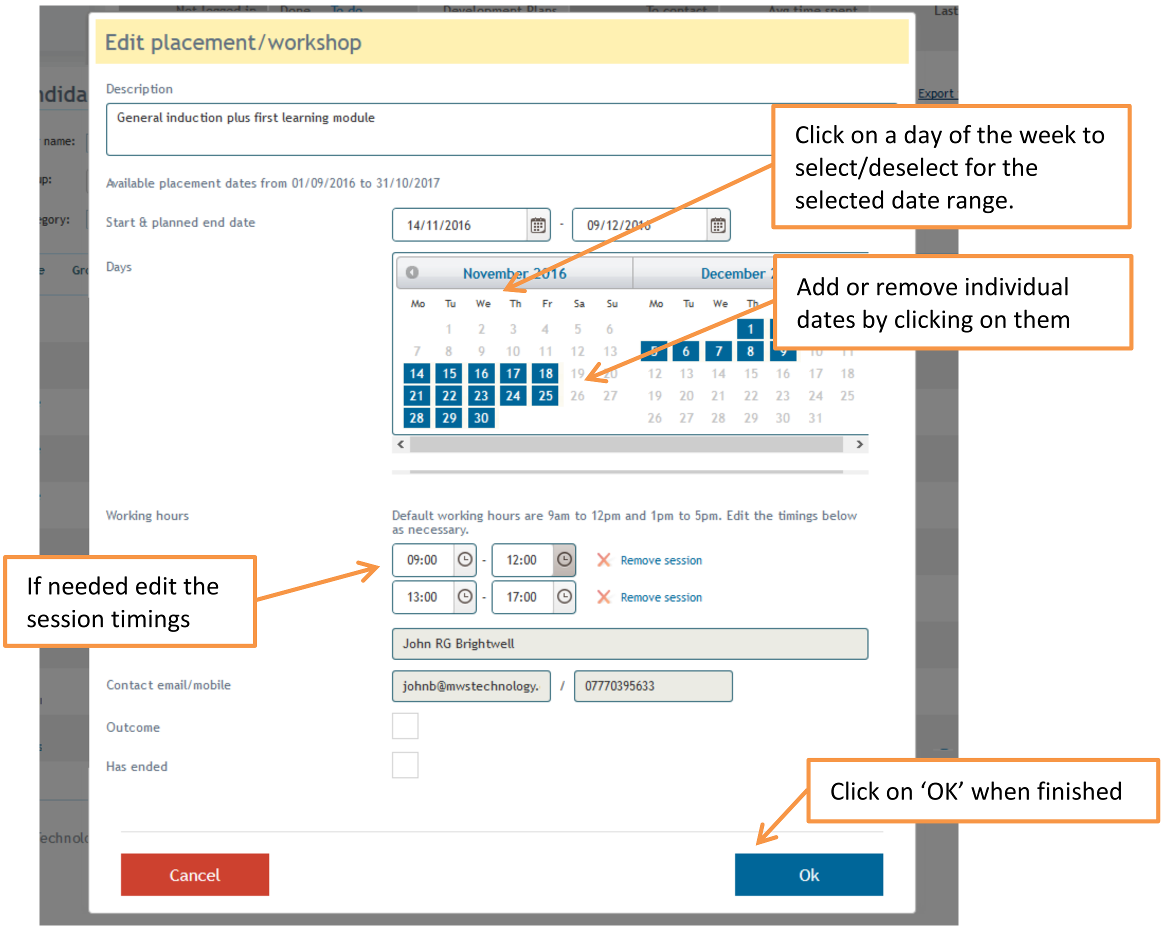
Editing the current placement/ workshop for a user

A user's current placement/ workshop can be edited or removed – for example if they have decided not to attend or have found another.

1. Sign in to your administrator account. In the navigation panel click on the Users tile to view the Users report page.
2. Search for the user who you wish to enrol and click on their name to view their individual profile report.
   Scroll down the individual profile to the 'Managed Jobs and Placements' section. The individual's work placements will be displayed.



3. Click 'delete' to remove a placement, and click 'Yes' on the confirmation message.
4. Click 'edit' to change a placement. This will display the Edit placement screen, where the dates and timings of the placement can be changed.



Work Placement Wizard

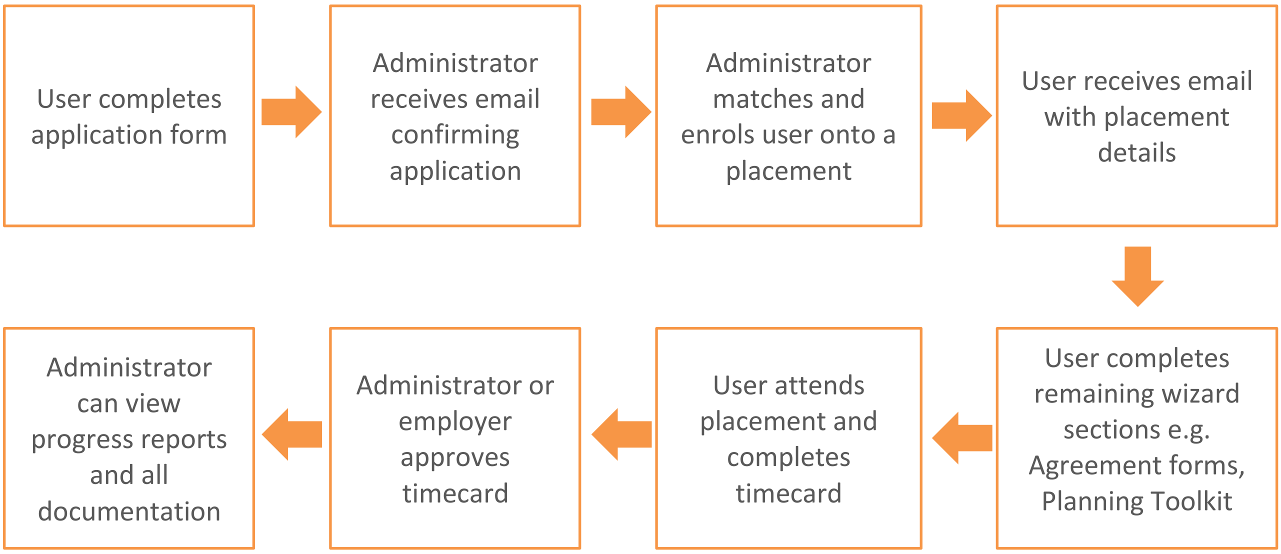
The Work Placement Wizard presents an automated process to manage and easily collect relevant information from each stage of a work placement (or work experience or training placement) in a consistent and structured manner.

The wizard is a flexible tool which allows the collection of information using either the default template or can be customised to meet your organisation's workflow and information needs from any or all of the following steps in a work placement process:

- Users apply for a work placement – demonstrating that they meet certain criteria and/or defining their work experience requirements. This step could be used to screen applicants based on for example, career interests, key skills, or location and transport availability.
- Agreement forms such as a code of conduct, parental consent or employer agreements.
- Planning Toolkit. A customisable form for users to plan and prepare for the work placement.
- SWOT analysis – helps users to identify their strengths and weaknesses.
- Employability Skills – enables users to record their skills.
- On-Placement forms such as induction forms.
- Placement progress – logging of work placement hours through an online timecard.
- Assessments.

The steps within the process require either user or administrator action with the automatic generation of notification/next steps emails upon the completion of each step.

A typical process might include the following steps:

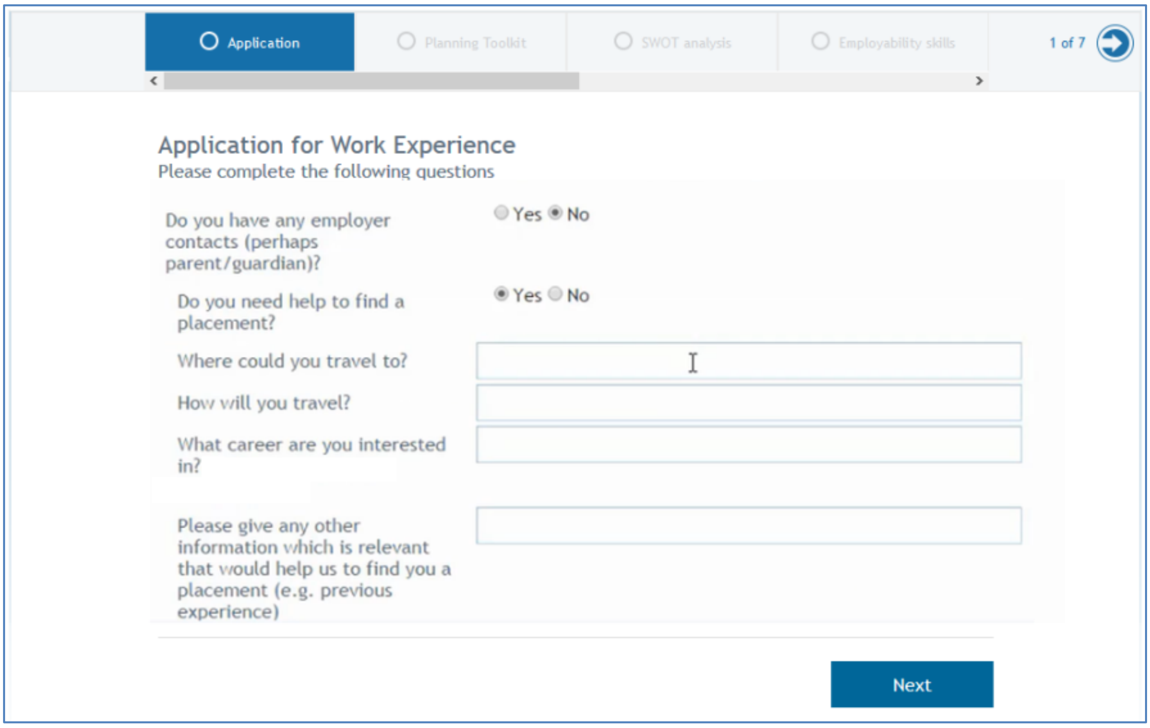


The user journey using the Work Placement Wizard

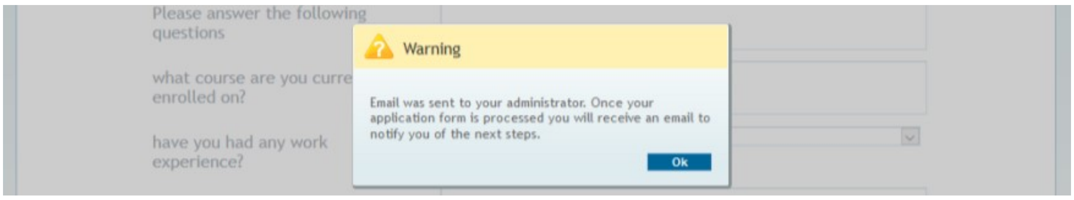
This section provides an overview of the user journey through the Work Placement Wizard. The user will need to sign into their Aptem account and complete the initial "Application" step of the Work Placement Wizard. If they are then enrolled onto a placement by an administrator there will be further steps which prepare them for their placement and document progress during the placement.

1. The user should sign into their Aptem account. In the navigation panel they should click on the '***Work placement wizard***' tile.

- The 'Application' questionnaire step of the Work Placement Wizard will be displayed. This is an online form, the default version comprises a series of questions about the type of work experience the learning is seeking. The user types their answers and clicks 'Next' when finished.

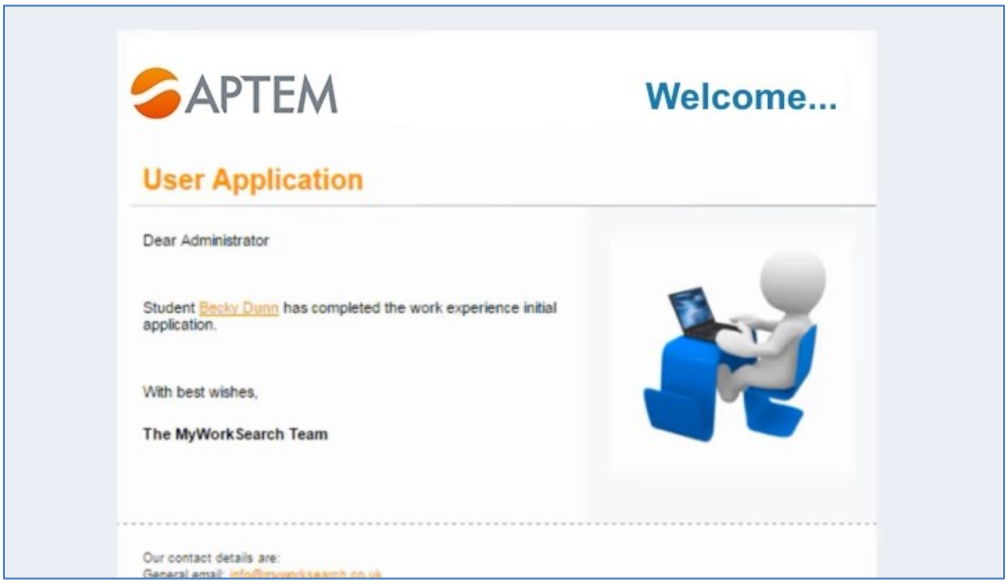


The user will then see an onscreen confirmation that an email has been sent to the account administrator.

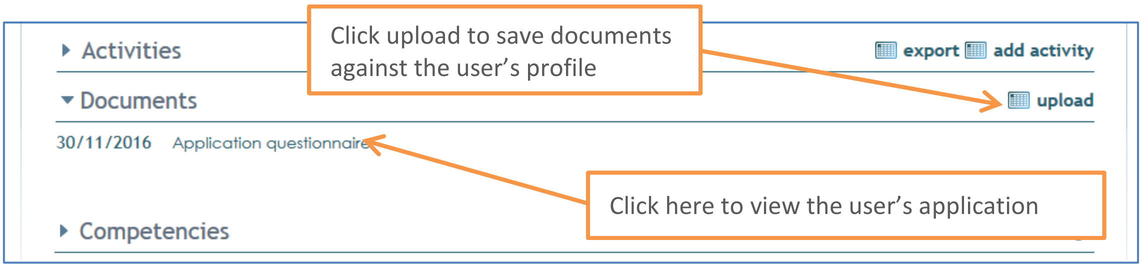


- The administrator receives an email prompting them to sign into Aptem and view the

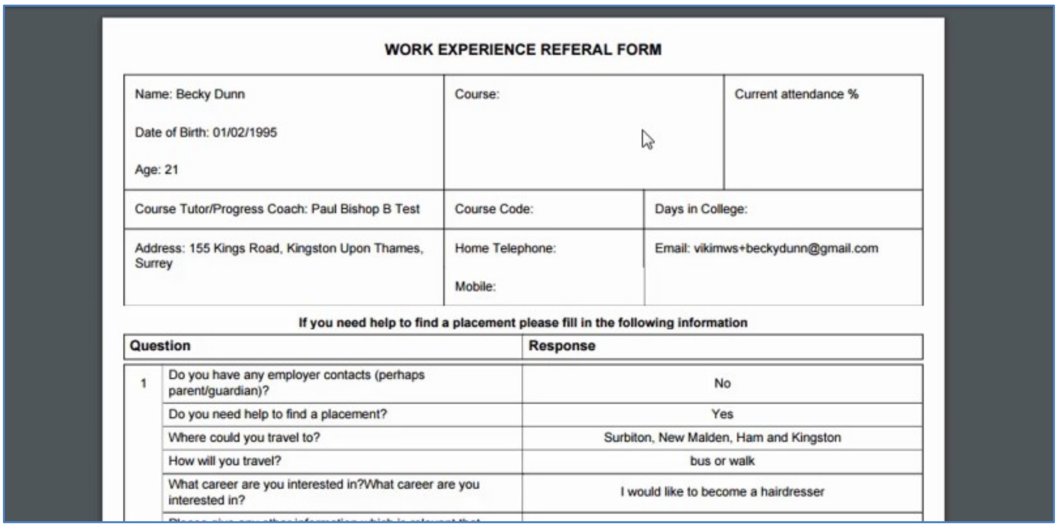
Individual Profile report for the user.



The ‘Documents’ section of the user’s profile report will contain a link to the user’s application questionnaire.



The user’s work experience application form will be displayed in pdf format. The Documents section can also be used to store any important documentation such as parental consent forms. These forms can also be uploaded as part of the Work Placement Wizard.



WORK EXPERIENCE REFERAL FORM

Name: Becky Dunn Date of Birth: 01/02/1995 Age: 21	Course:	Current attendance %
Course Tutor/Progress Coach: Paul Bishop B Test	Course Code:	Days in College:
Address: 155 Kings Road, Kingston Upon Thames, Surrey	Home Telephone: Mobile:	Email: vikimws+beckydunn@gmail.com

If you need help to find a placement please fill in the following information

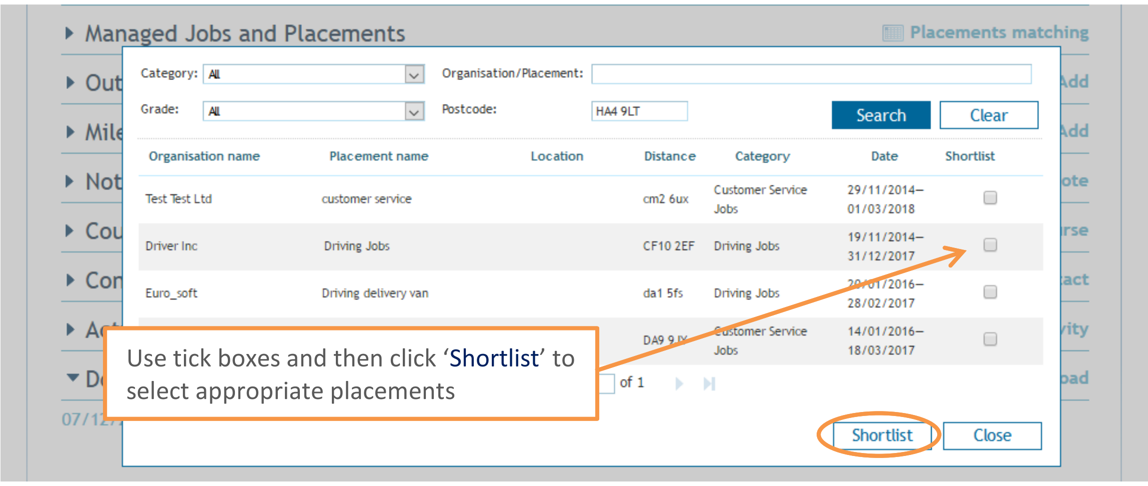
	Question	Response
1	Do you have any employer contacts (perhaps parent/guardian)?	No
	Do you need help to find a placement?	Yes
	Where could you travel to?	Surbiton, New Malden, Ham and Kingston
	How will you travel?	bus or walk
	What career are you interested in?What career are you interested in?	I would like to become a hairdresser

2. The administrator can review the user’s application form and then enrol the user onto a suitable

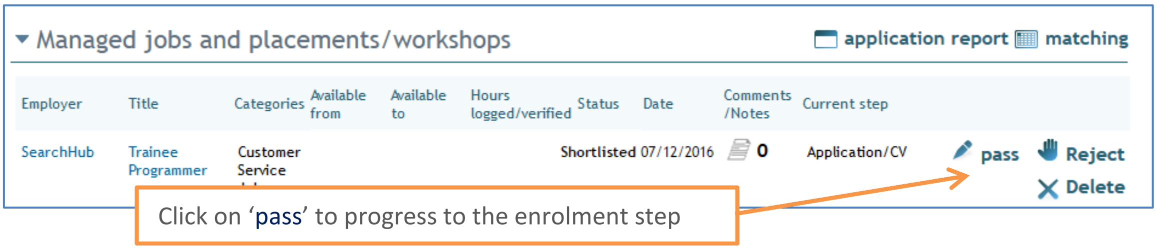
work experience placement. These steps are clearly explained in section [Enrolling an individual onto a placement](#) but in summary the administrator needs to do the following:

a. In the users profile page, navigate to the 'Managed Jobs and Placements' section, and click on the 'Placements matching' link.

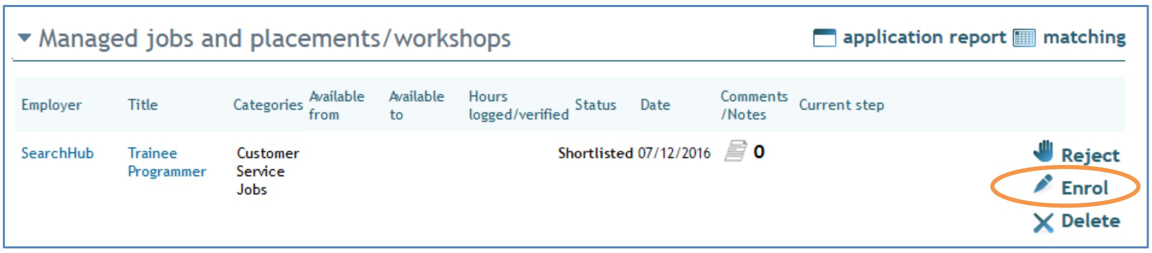
- Use the search options to identify suitable placements and shortlist the user for one or more of these.



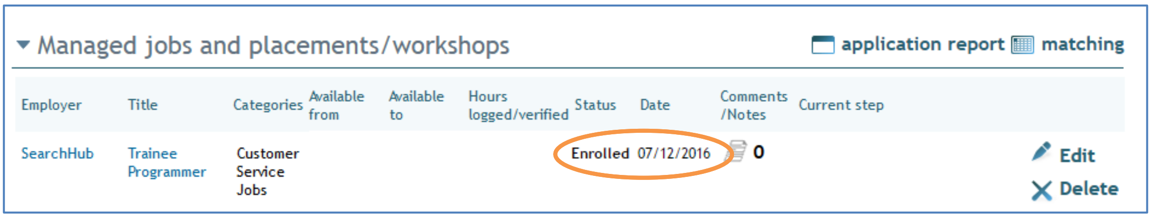
- The Managed Jobs and Placements section for the user will be updated with shortlisted placements.



- Next click on 'Enrol'. This will display a screen to allocate the user to the placement and confirm details such as the start and end dates, session times, and employer contact details.



- The Managed Jobs and Placements section of the user's profile will be updated to show that the user is enrolled on the placement.

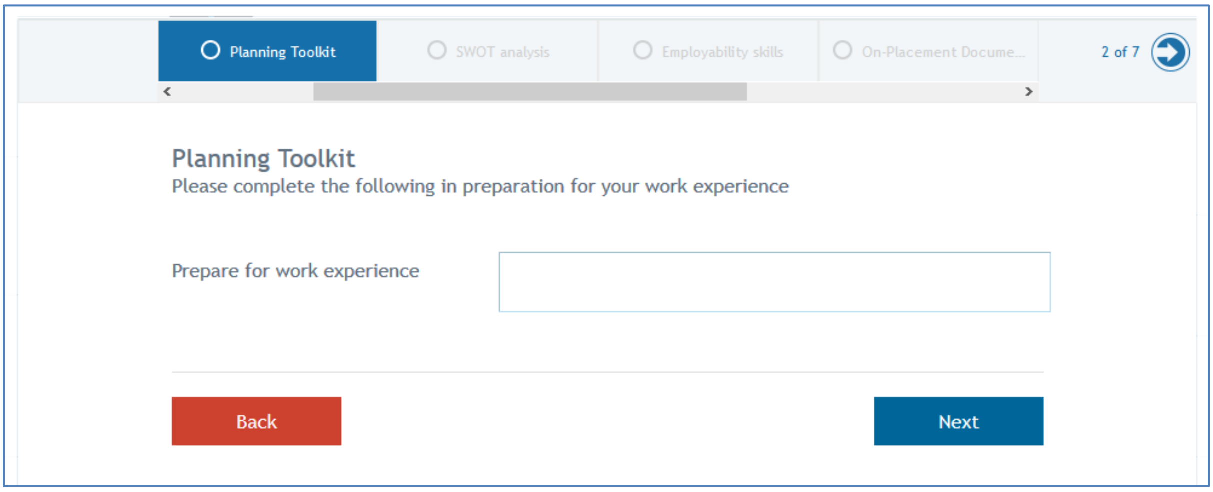


The user completes remaining work placement wizard steps

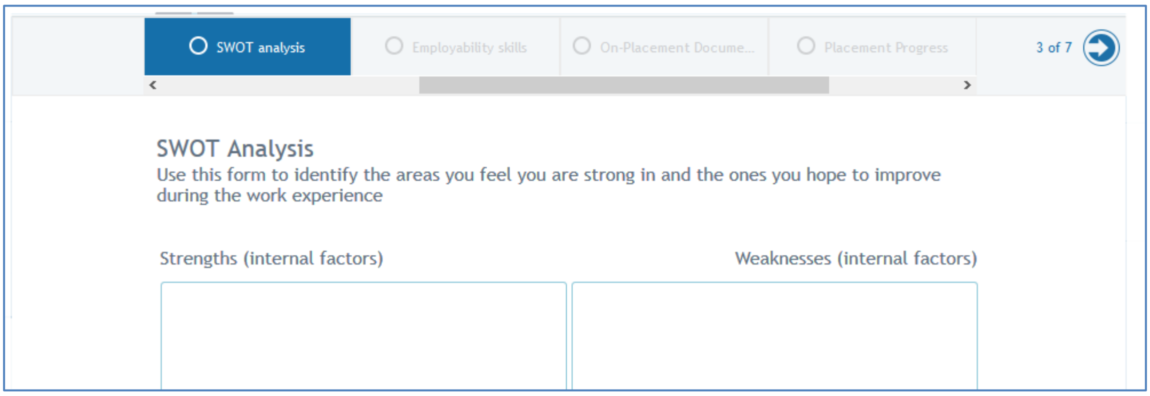
Once enrolled on a placement the user can sign into their account and click on the 'Work Placement Wizard' tile in thier navigation panel.

These steps can include:

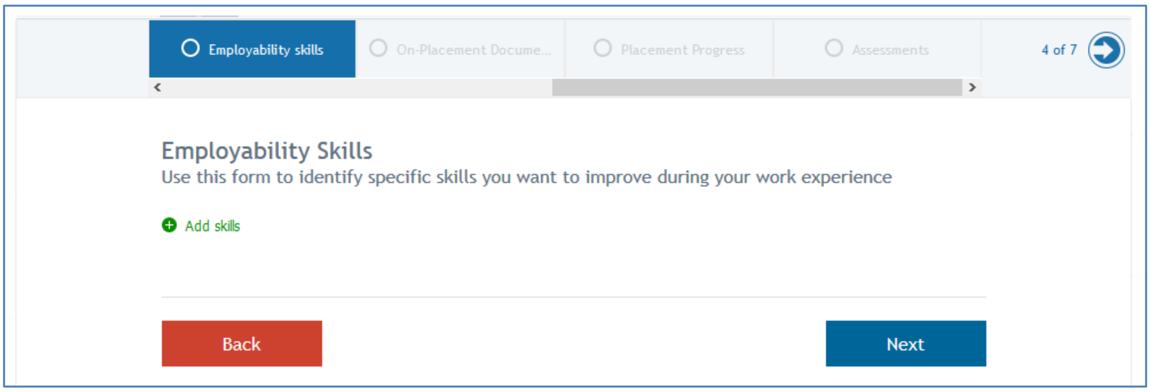
- Planning Toolkit covering preparation for the placement.



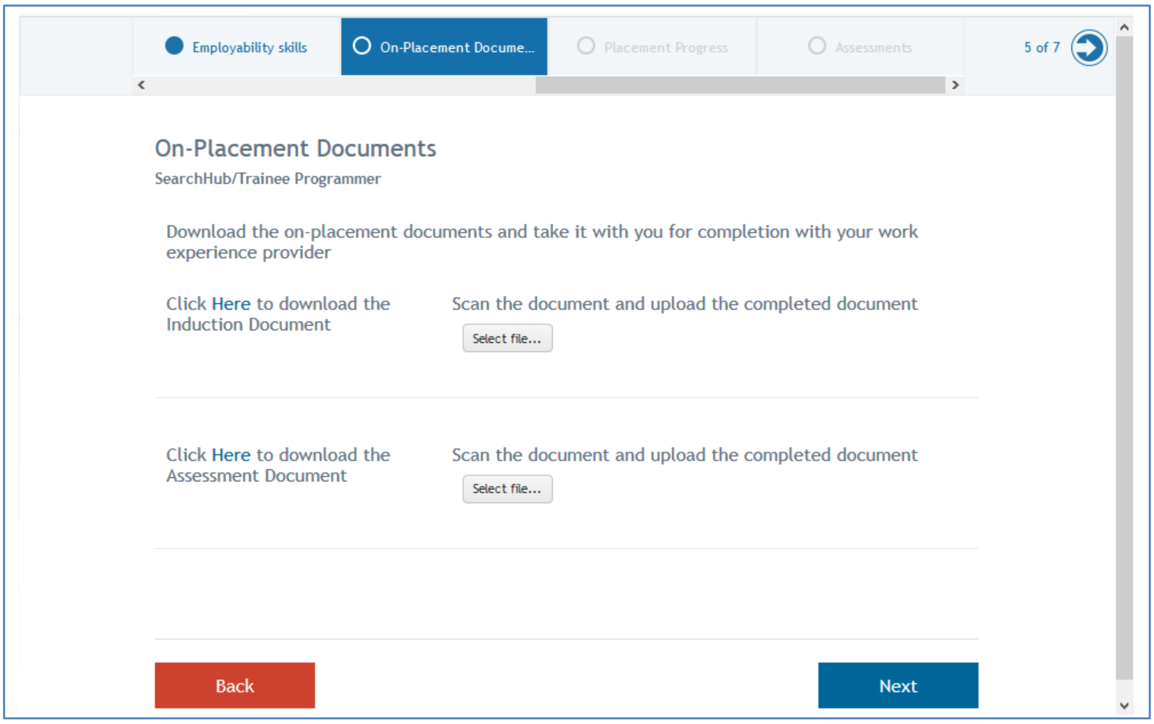
- A SWOT Analysis to explore self-awareness and development opportunities during the work placement.



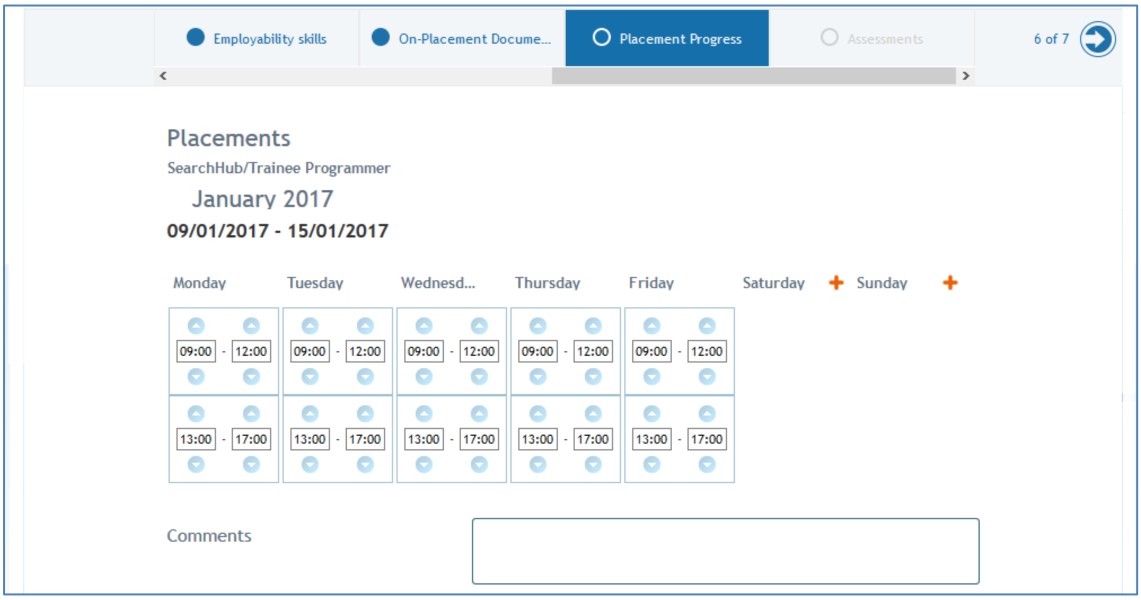
- Employability Skills planning.



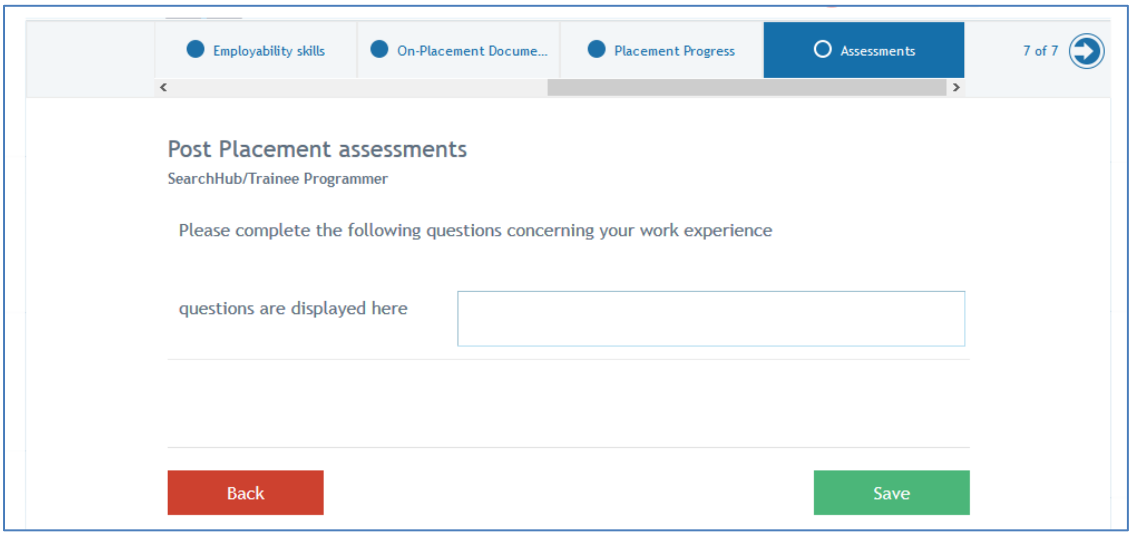
- On-Placement Documents: This section can provide, for example, induction documentation or consent forms for the user.



- Placement Progress – which displays a timecard for the placement



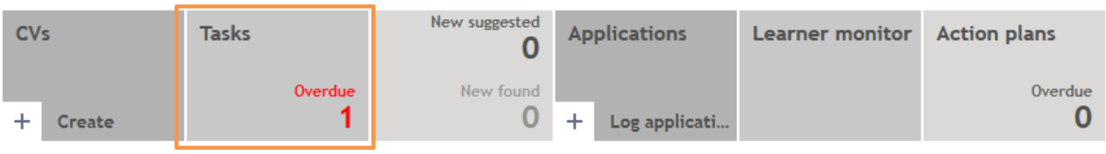
- Assessments tab – which can be used to present a questionnaire to be completed after the placement, for example questions on skills learnt and reflection on the placement experience.



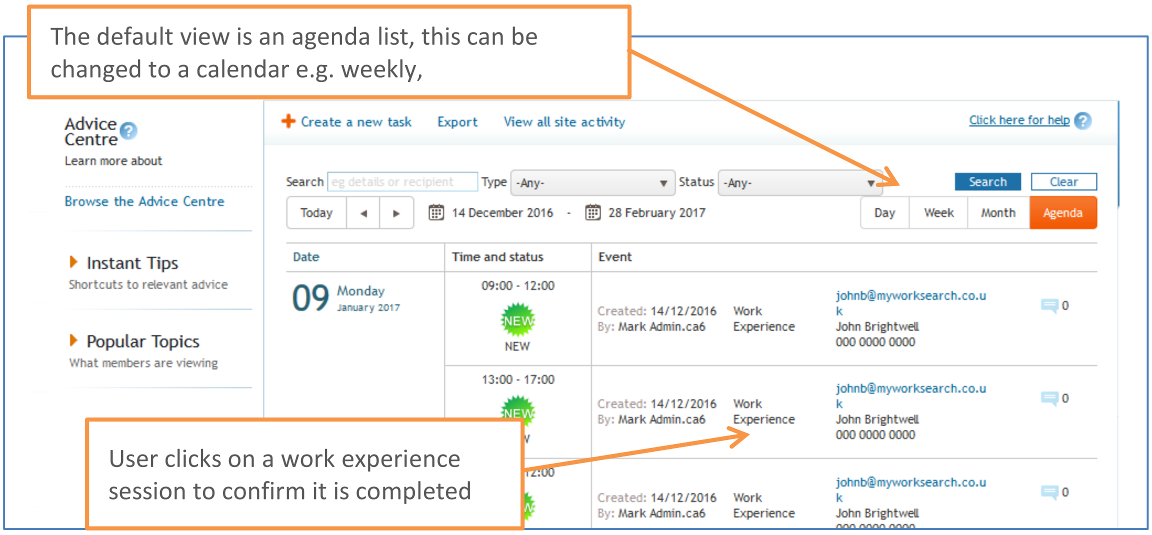
The user records their time on the placement

When a user is enrolled onto a placement their Aptem task list is automatically populated with the placement dates and session times. The user can easily record their time on the placement as follows:

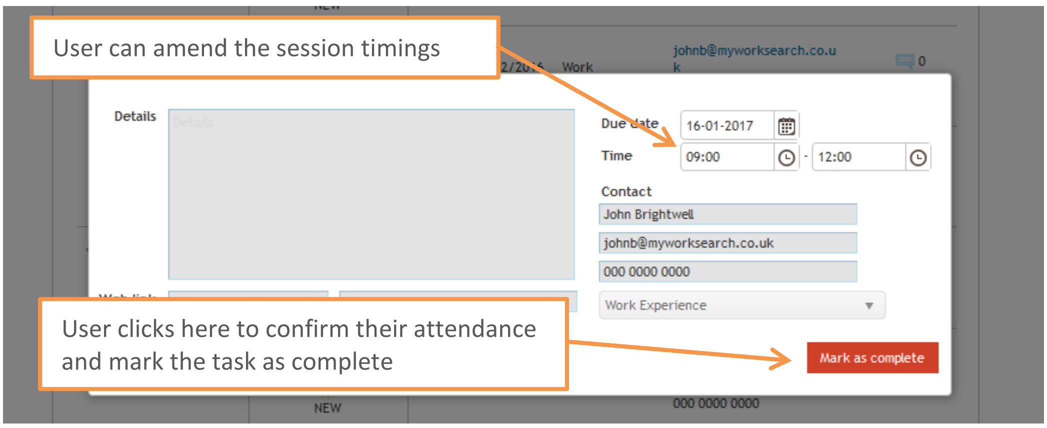
2. The user signs into their Aptem account and in the navigation panel selects the '***Tasks***' tile.



- The user's task list will be displayed. By default this is displayed in an agenda list, but the user can also choose a calendar format. The tasks and events for the current week will be shown.



A user can record that they have completed a work placement session by clicking on the relevant session in their Tasks list. The details of the session will be displayed, if needed the user can edit the timings, then the user clicks on 'Mark as complete' to confirm their attendance.



Onboarding Wizard

The Onboarding Wizard is an automated structured process for the collection of information for compliance forms and the setting up of an account. The Onboarding wizard is highly configurable and we recommend contacting our Client Support team on 020 7870 1000 to ensure that it is correctly set up to meet your requirements.

The Onboarding Wizard contains a number of useful steps, each of which can be switched on as required to match your organisations workflow. The available steps include:

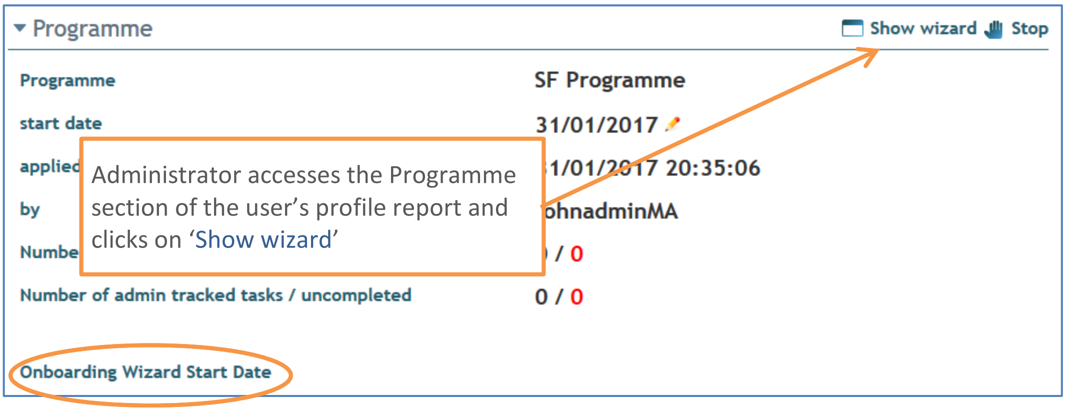
- Introduction screen for your tailored message. For example this could be an explanation of the purpose and steps in the wizard.
- Personal Information: This questionnaire gathers information about the user or learner. There are default templates which collect the relevant information for compliance or funding purposes, for example the ESF funding Information form or the Individual Learner Record (ILR). These default templates cannot be changed, however additional questions or alternatives can be added to this step.
- ILR: An online version of the Individual Learner Record which can be completed by users, then approved and uploaded to the Education and Skills Funding Agency.
- Assessments: There are a number of default assessments that can be selected for the user to complete: these include the Transferable Skills assessment, Careers Interests, Work Style behaviours, Numeracy and Literacy.
- Reality Checks: A set of questions for users to check that there target jobs are realistic in terms of their qualifications, skills, location, salary expectations and available vacancies.
- CV: requires a CV to be created using CV Builder.
- Smart Action Plan: requires the user to create a smart action plan.
- Custom Questionnaire: allows the creation of customised questionnaires to gather additional information from users.

The Onboarding steps can be completed remotely by users, although we recommend that it is completed at a face to face meeting with an advisor in order to capture and discuss the implications of the collected information and agree next steps.

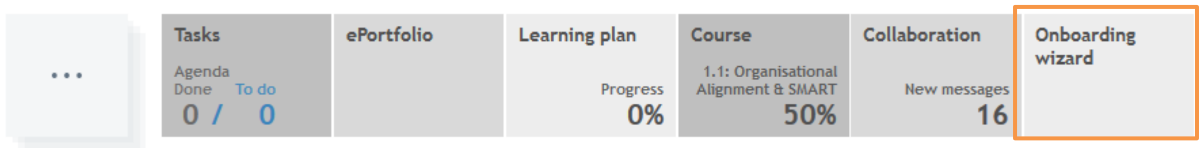
The user journey using the Onboarding Wizard

This section provides an overview of the user journey through the Onboarding Wizard.

The wizard is usually started by the administrator clicking on the 'Show wizard' link in the Programme section of the user's profile report. The date is then recorded in the Onboarding Wizard Start Date line.

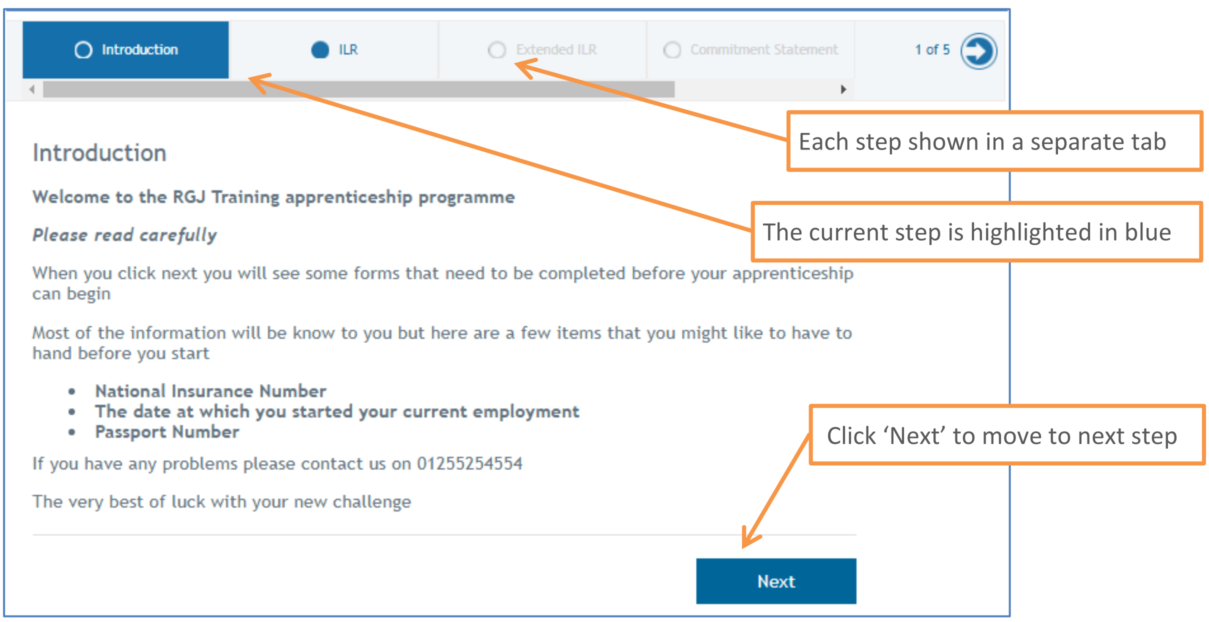


Alternatively if enabled then users can directly access the wizard by clicking on the *Onboarding wizard* tile.

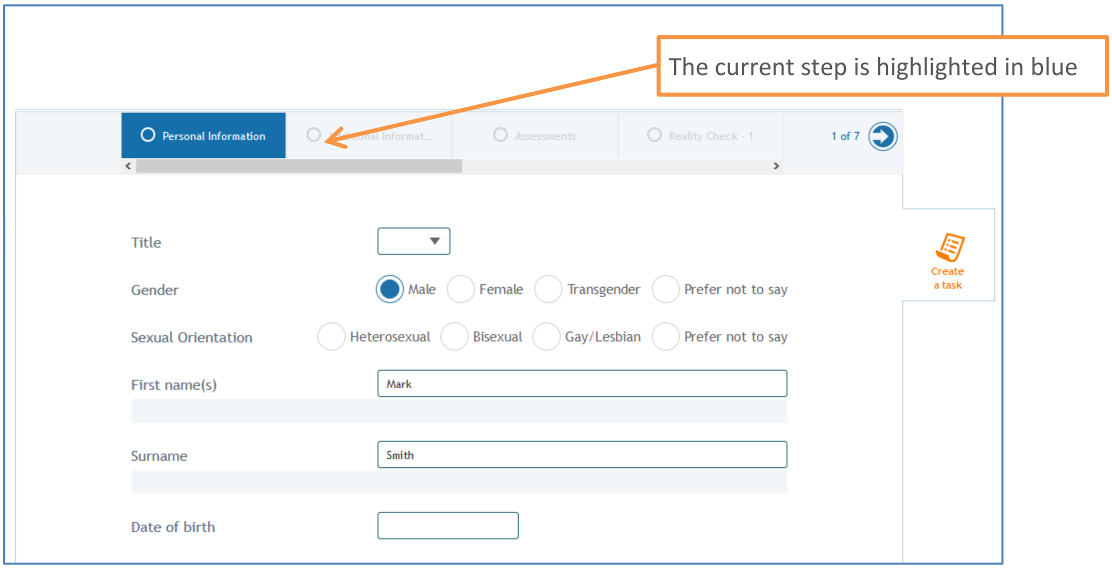


The following screen shows an example of the Onboarding wizard from the user's perspective. Each step can be modified or disabled to meet the needs of your organisation.

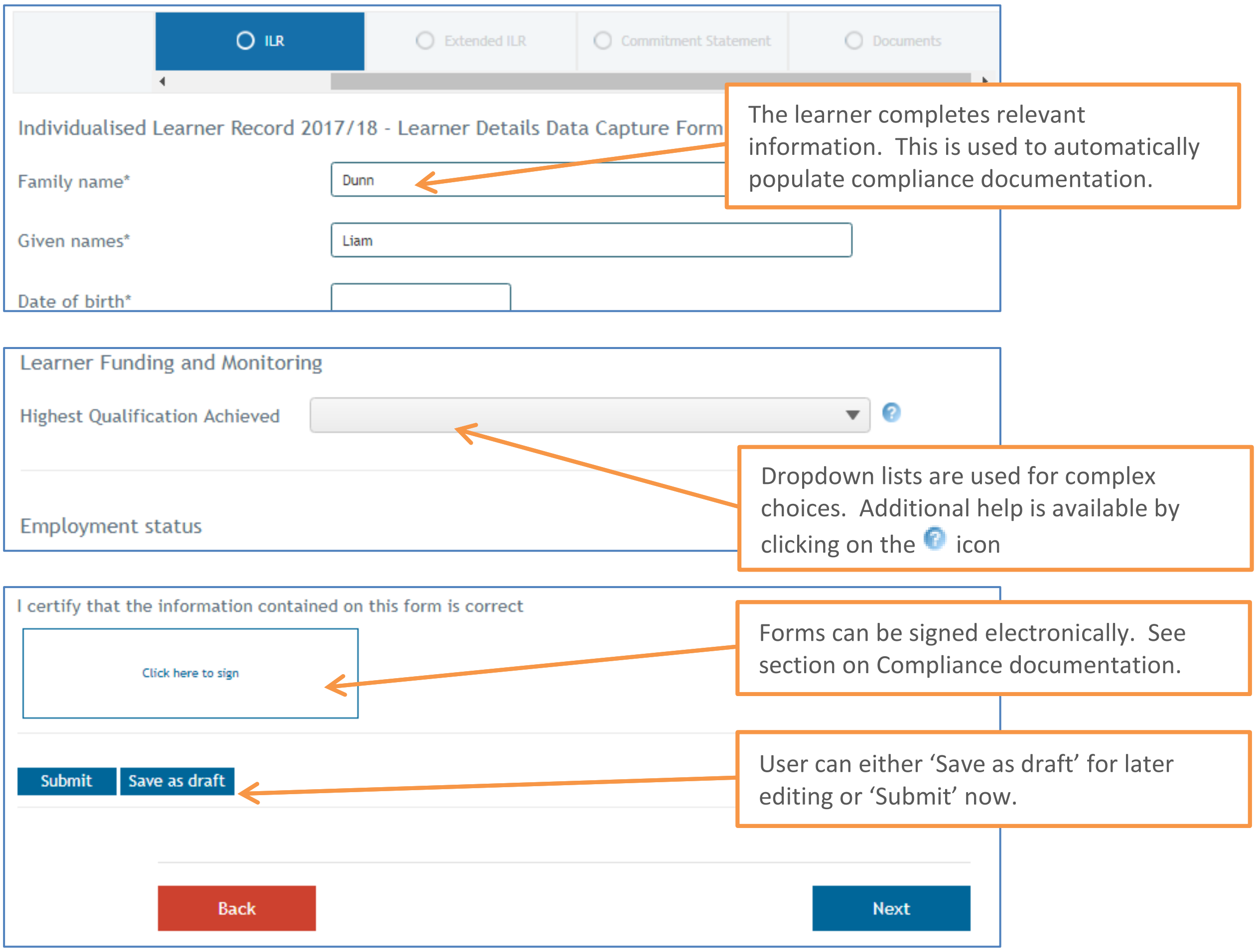
For example the first step could be an introductory screen.



The next step could be the collection of ‘Personal Information’.



Another example is the collection of information for an Individual Learner Record (ILR).



Aptem Skills Radar

The Aptem Skills Radar™ involves using the competency monitor feature to make an initial assessment of each user against a set of skills, behaviours or competencies. As part of this assessment, target actions and progress levels can be set along with deadline dates on an individual basis. All assessment history is tracked, thus each individual user's progress can be monitored and reported on.

A Skills Radar can be used at any point throughout a user's programme in Aptem, but typically it can be scheduled at the beginning of a user's learning programme to assess prior learning and created personalised learning targets. Subsequent use of the Skills Radar reporting feature can demonstrate progress.

Creating a Skills Radar

The Skills Radar should be part of the user's learning plan. However to create a Skills Radar follow the steps below. More detail can be found in a separate guide from the Aptem support team.

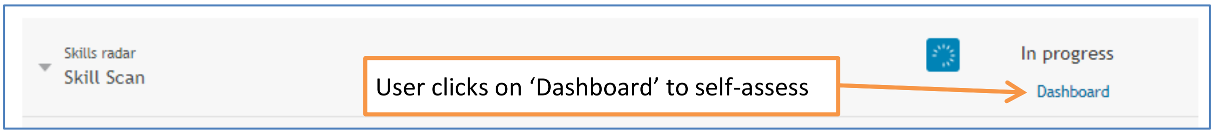
1. Sign in to your administrator account.
2. In the navigation panel on the '**Competencies**' tile.
3. Then click on 'Create Competency' and 'Add characteristic'.

When creating the performance levels we recommended using 10 levels so that users can self-rate and be rated on a 1 to 10 scale. This also allows for the setting of targets and gradual progression over longer time periods.

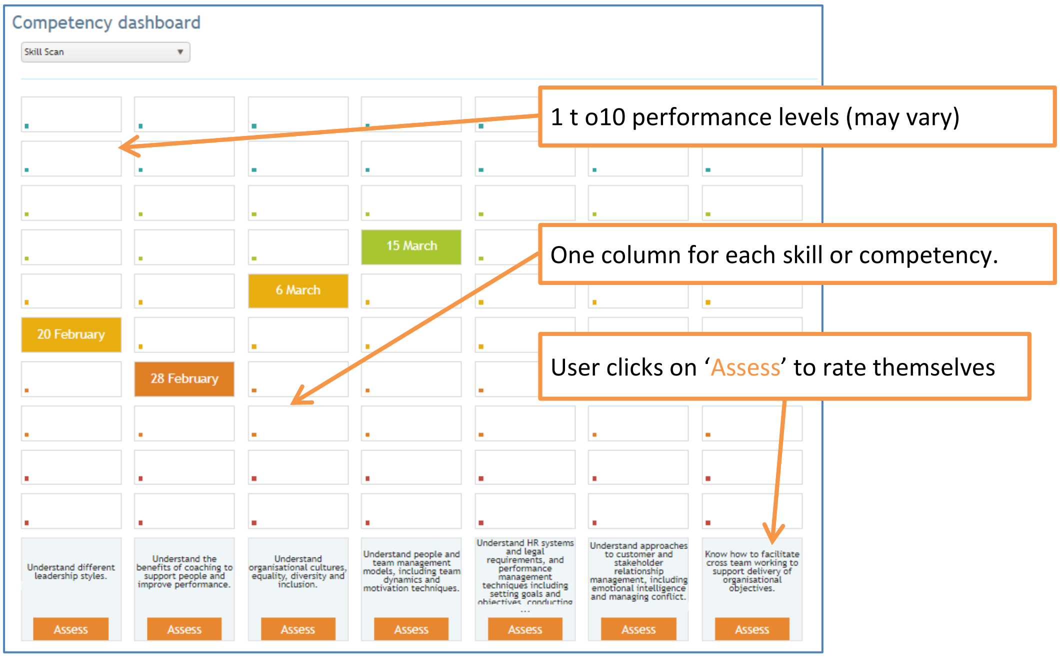
Completing a Skills Radar - User

Users/Learners can complete the skills assessment by signing into their Aptem account and clicking on the 'Learner Monitor' tile.

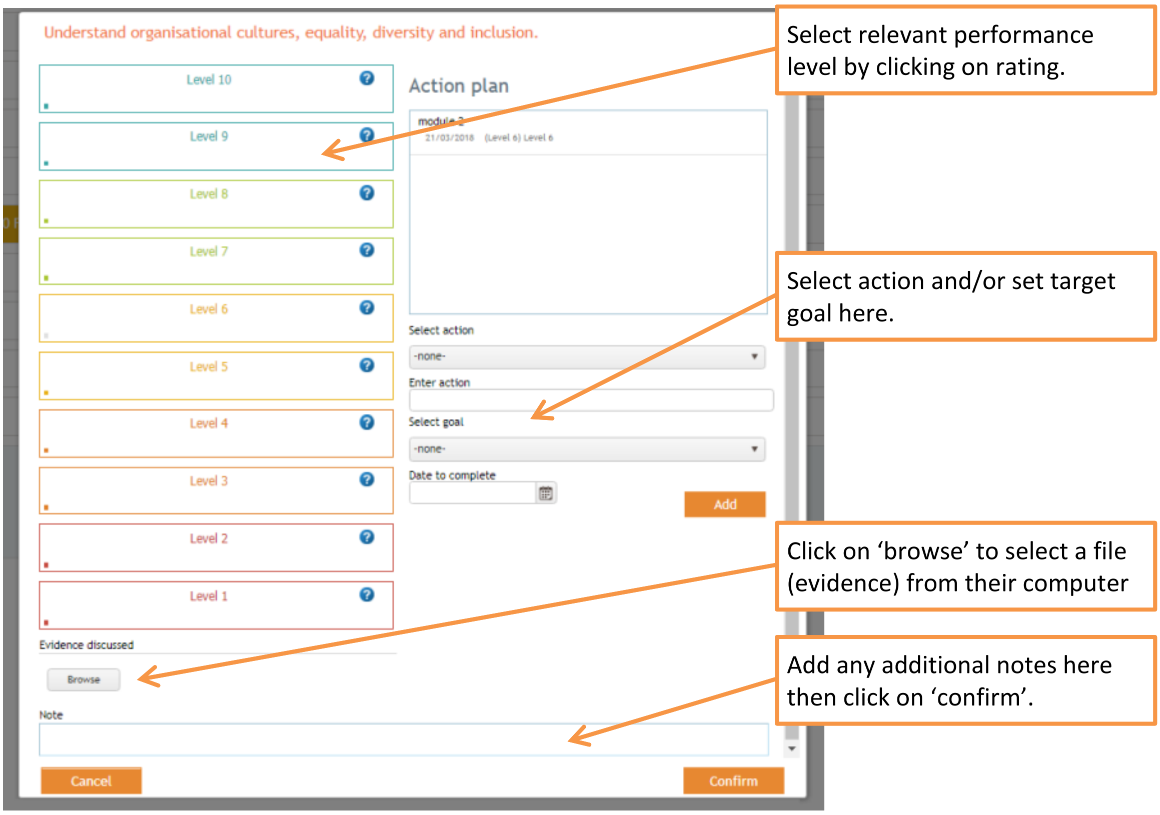
1. If the Skills Radar is part of a learning plan then the user can click on their 'Learning Plan' tile and then find the Skills Radar item.



2. Clicking on ‘Dashboard’ will display the assessment for the user to assess themselves on each of the behaviours, skills or competencies.



3. Clicking on ‘Assess’ for an individual skill or competency allows a user to choose one of the performance levels, set themselves a target level and choose a development action or task.

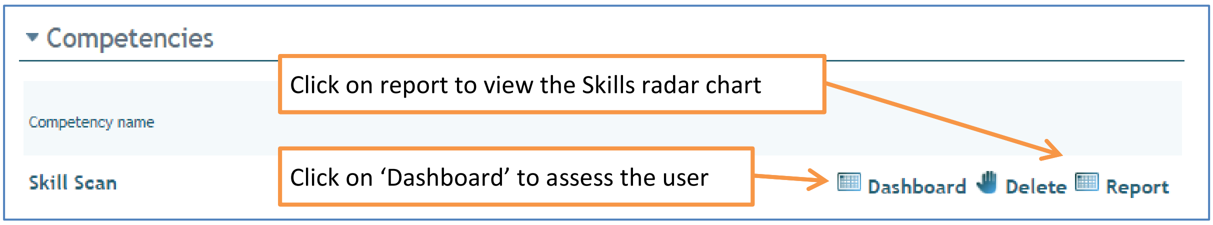


Assessing and viewing a Skills Radar - Administrator

Administrators can review and also assess a user's skills scan and view a radar plot of their progress.

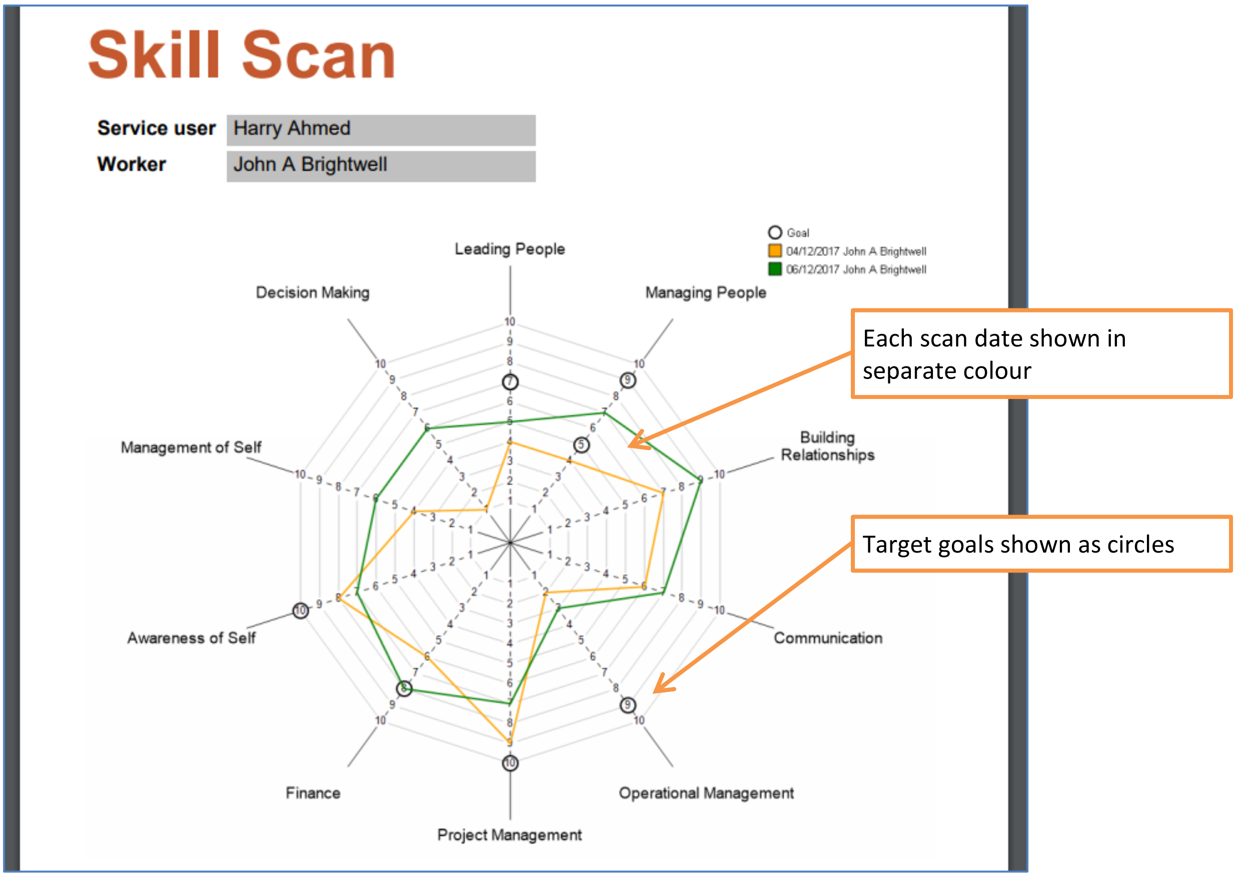
If the user had completed the skills radar as part of a learning plan then click on the Learning Plan tile in the navigation panel and search for the user to view their learning plan. Find the Skill Radar item then click on 'Dashboard' to view the details.

Alternatively from the 'Competencies' section of a user's profile page, click on 'Dashboard' to rate the user against the performance levels for the competencies or skills.



<u>Viewing a Skills Scan radar chart - Administrator</u>

Clicking on the 'Report' link in the 'Competencies' section of a user's profile page will display or download a PDF report of their progress. The report displays a radar chart, and any progress notes saved against each competency.



Managing e-signatures and compliance documents

Aptem can be used to complete, sign and counter sign documentation from all parties who use the system. Many externally funded programmes require the completion of compliance documentation in order to prove registration, receive funding and demonstrate outcomes.

If enabled in your organisation account the following features are available:

- Availability of compliance documents as electronic templates e.g. ILR, individual learning plan.
- Ability for users, learners, advisors and third parties (e.g. employers) to electronically sign documents.
- Automatic population of documentation with relevant information stored within Aptem.
- Generation of signed documents in non-editable pdf format for audit purposes.

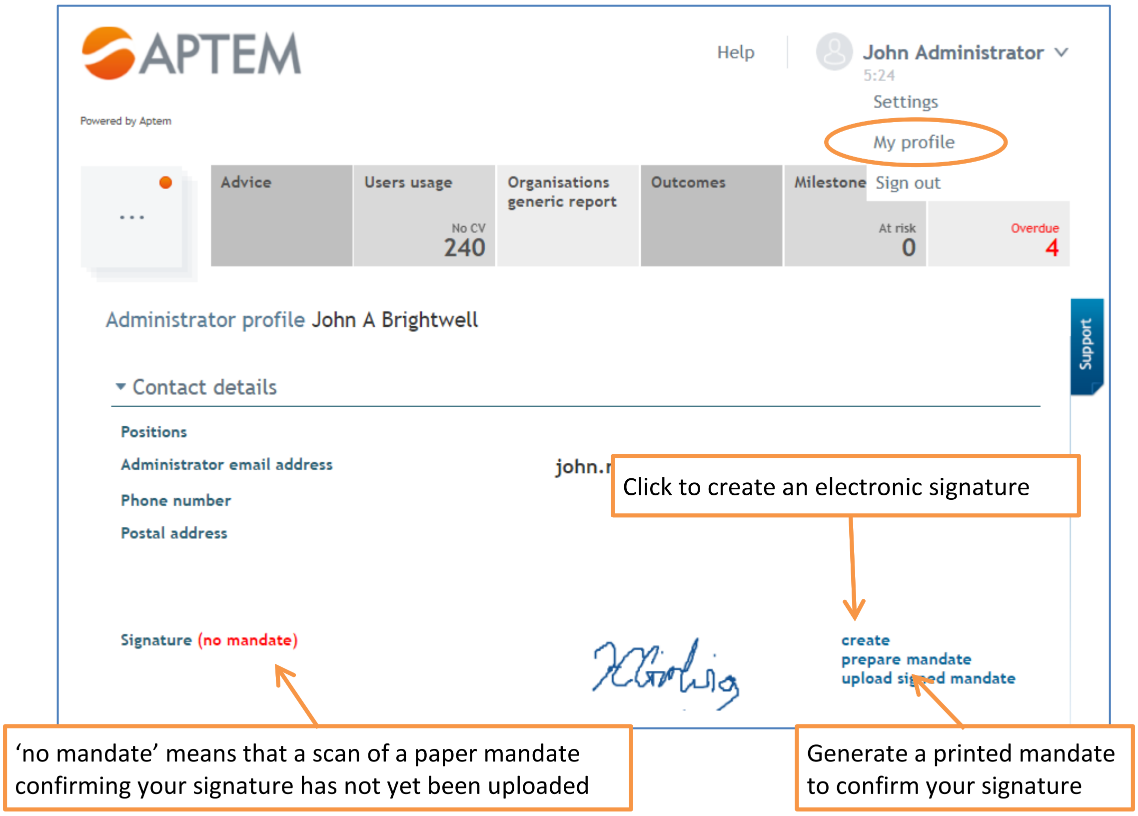
Creating or amending your electronic signature

Administrators, users, learners and employers will need to create an electronic signature before documents can be signed.   It is not necessary to create a signature in advance as Aptem will prompt you to provide a signature sample when one is needed to complete a document.

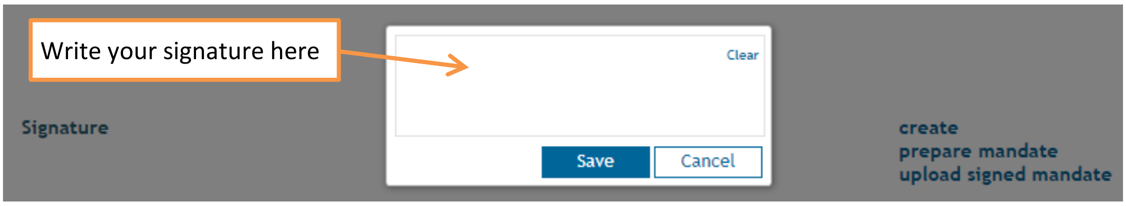
As an administrator you can check and amend your signature at any time.

1. Sign in to your administrator account.

2. Click on the arrow next to your name and choose the ‘My Profile’ option.



3. In the Contact details section of your profile, click on ‘create’ to add your e-signature. If you have an existing signature it will be displayed in the Signature section of your profile. Creating a new signature will overwrite your existing signature.
4. A signature box will be displayed. Use your computer mouse or touchscreen to write your signature in the box and then click ‘Save’.



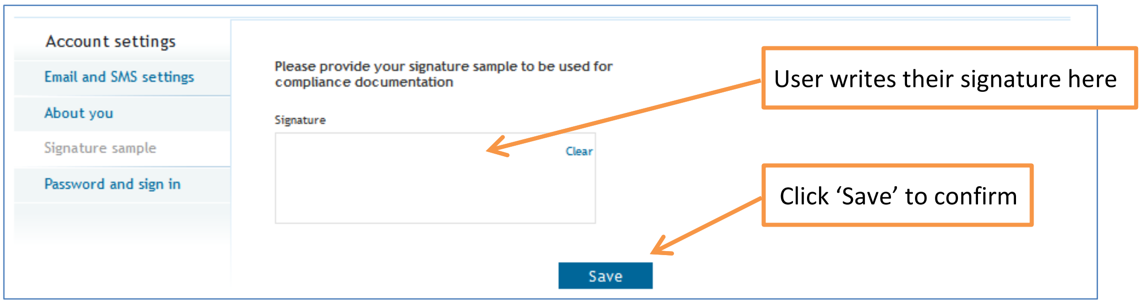
5. Your e-signature will now be available for use on all compliance documents within Aptem

User, learner and employer signatures

An employer with an Aptem account will be automatically prompted for an e-signature. They can amend their signature using the process described above.

Similarly users and learners will also be prompted to create an e-signature the first time it is needed. They can also amend their signature using the following steps:

1. Sign into their account, and click on the ‘∨’ icon next to their profile name, and click on ‘Settings’. Their account settings will be displayed.
2. Next click on the ‘Signature sample’ option, and using their computer mouse or touch screen draw or write their signature.



Validating e-signatures with signature mandates

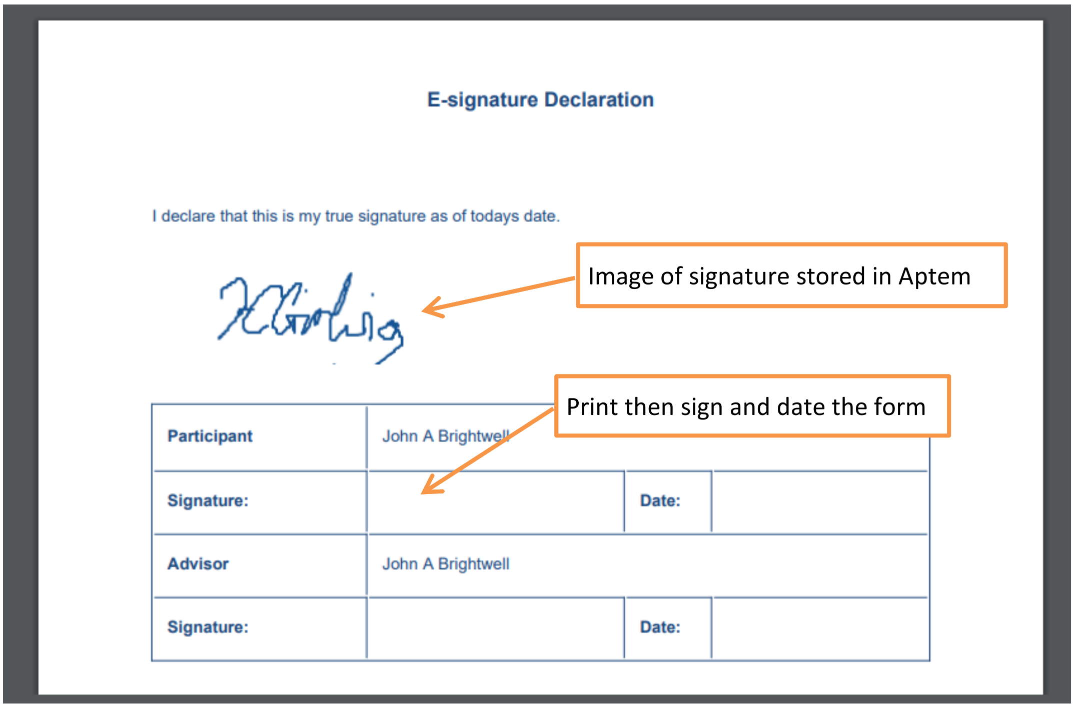
Each user, learner, employer or advisor electronic signature will need to be validated by uploading to Aptem a signed witnessed declaration that the e-signature is the individual’s signature.

To mandate an administrator’s signature:

1. Sign into your account, and click on Settings-My Profile to view the Contact details section of your own profile.
2. If an e-signature has not been created then click on ‘create’.
3. Next click on ‘prepare mandate’ at the bottom of the Contact details section. A PDF document will be either downloaded or displayed in a new window in your web browser. This document

will display your signature, and a space for you to sign and date the form. There is also space for someone to witness the signature.

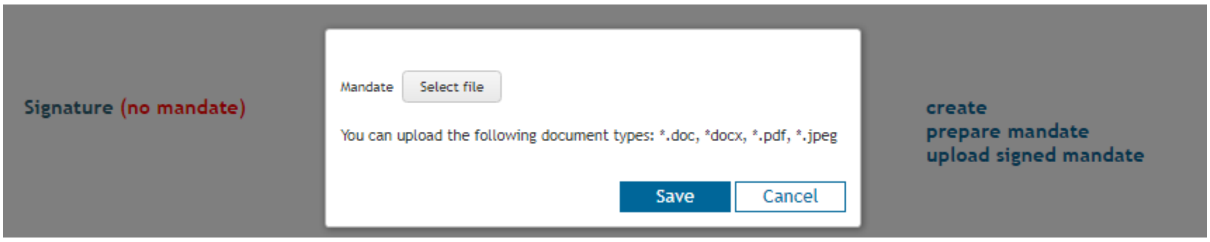
4. Print the document on to paper and then sign and date it.



5. Print the document on to paper and then sign it.

6. Either scan or take a digital photo of the signed declaration, and save this file to your computer. It can be in jpeg, MS word or PDF format.

7. Click on 'upload signed mandate' at the bottom of the Contact details section of your profile.



Next click on 'Select file' and choose the appropriate file saved on your computer, then click 'Save'. The electronic version of the mandate will be saved in Aptem and the signature is valid for compliance documentation.

To mandate a user's signature:

1. Sign into your account, and click on the 'Users' tile to view a list of learners in your account. Next search for the relevant learner's name in the list and click on their name to view their Profile page.
2. Follow the steps above using the 'create'/ 'prepare mandate' / 'upload signed mandate' links in the Contact details section of the individual profile page.

Managing compliance documentation

Templates for relevant compliance documents will be available for each user within your account. Examples of available documents include: ILR (Individual Learning Record), commitment statement, and written agreements that need to be signed by the user and your organisation and/or a third party such as an employer. This feature needs to be enabled within your account.

Each document will be prepopulated with information available within Aptem. For example, ILRs will be populated with learner names, contact details and other information collected directly from users by the Onboarding Wizard or where provided elsewhere within Aptem such as qualification aims.

Overall the process can be summarised as follows:

Compliance document prepopulated with user information	→	Administrator checks document where necessary correcting data	→	User prompted to electronically sign document	→	Third party employer then Administrator prompted to e-sign document

For an individual user all relevant compliance documents are attached to their user profile. In addition administrators and users will automatically receive notifications in the Collaboration Centre when documents require e-signatures, and administrators have access to reports displaying the signature status of compliance documentation for their learners.

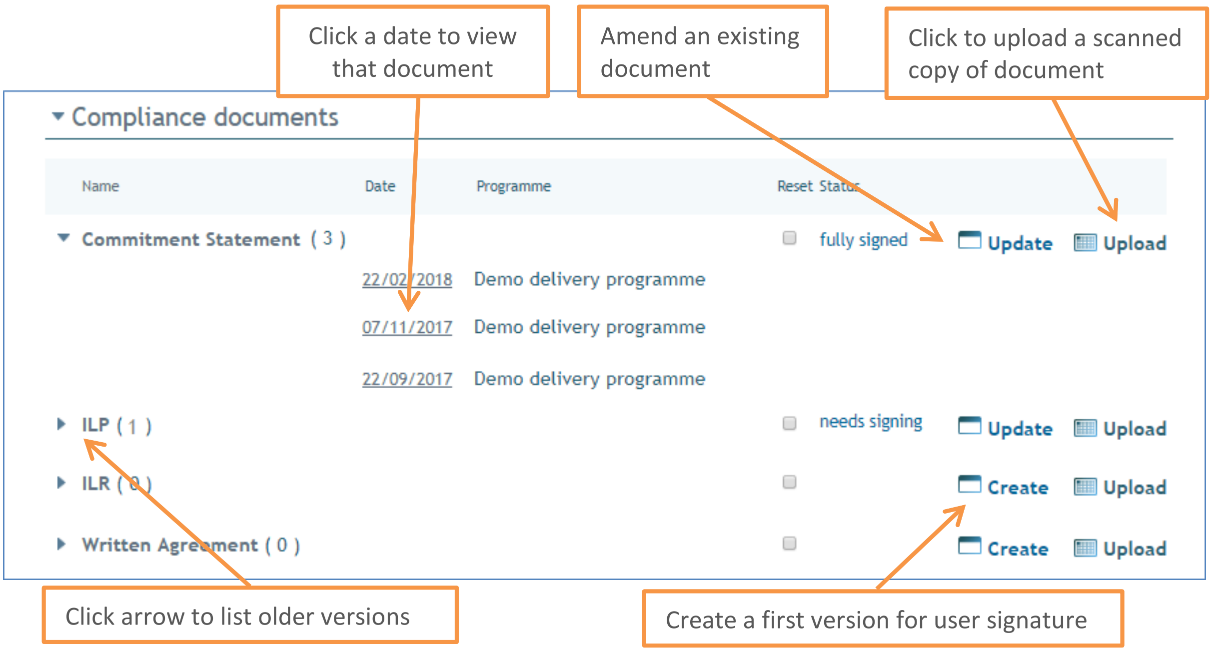
Checking the status of compliance documents for an individual

All compliance documents are created in draft format with the ability to amend relevant data fields according to the circumstances of the user and programme they are completing. These are displayed in the 'Compliance documents' section of the user's profile, from which:

- A new compliance document can be created
- The signature status of existing documents can be checked
- Document content can be updated and saved as a new version for signature.
- Scanned paper versions of completed documents can be uploaded to Aptem.

1. Sign into your account, and click on the 'Users' tile to view a list of learners in your account. Next search for the relevant learner's name in the list and click on their name to view their Profile page.

2. Scroll down to the '*Compliance documents*' section of the User's profile. This section displays all relevant compliance documents attached to their programme with Aptem.



- The number next to each document lists the number of versions created to date. Clicking on the arrow ▶ will display a list of all previous document versions.
- Each version of a document is date stamped. Clicking on the date of document allows it to be viewed in PDF format which can be printed or saved for reference.
- The status column indicates whether the document needs signing or is fully signed. This will be blank if a document is yet to be created.
- If there are changes to the user's details, circumstances or programme then these documents can be amended by clicking on 'Update'. Depending on the changes made some documents will need to be resigned by the user, employer and your organisation.
- Compliance documents that are yet to be created will be shown with a zero count. Click on the 'Create' link to generate the document. See section Creating a compliance document for a user to sign below

Creating a compliance document for a user to sign

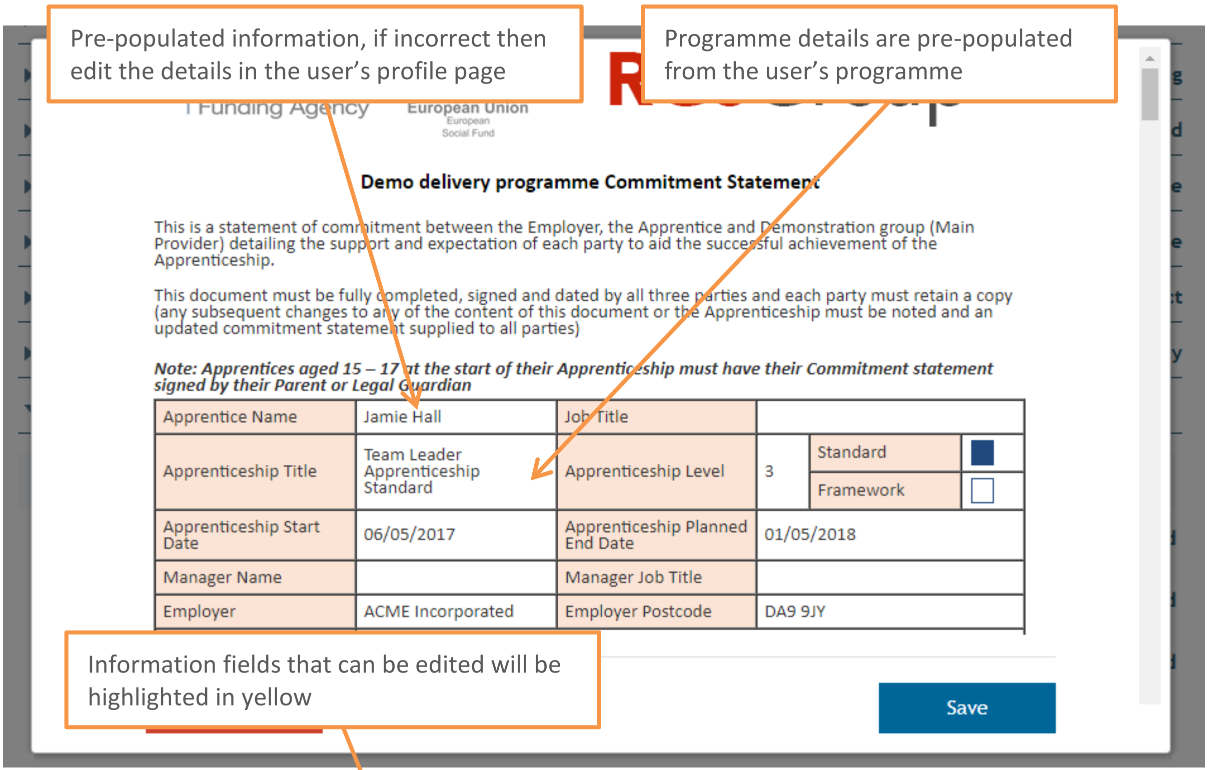
Compliance documents can be generated from the 'Compliance documents' section of a user's profile:

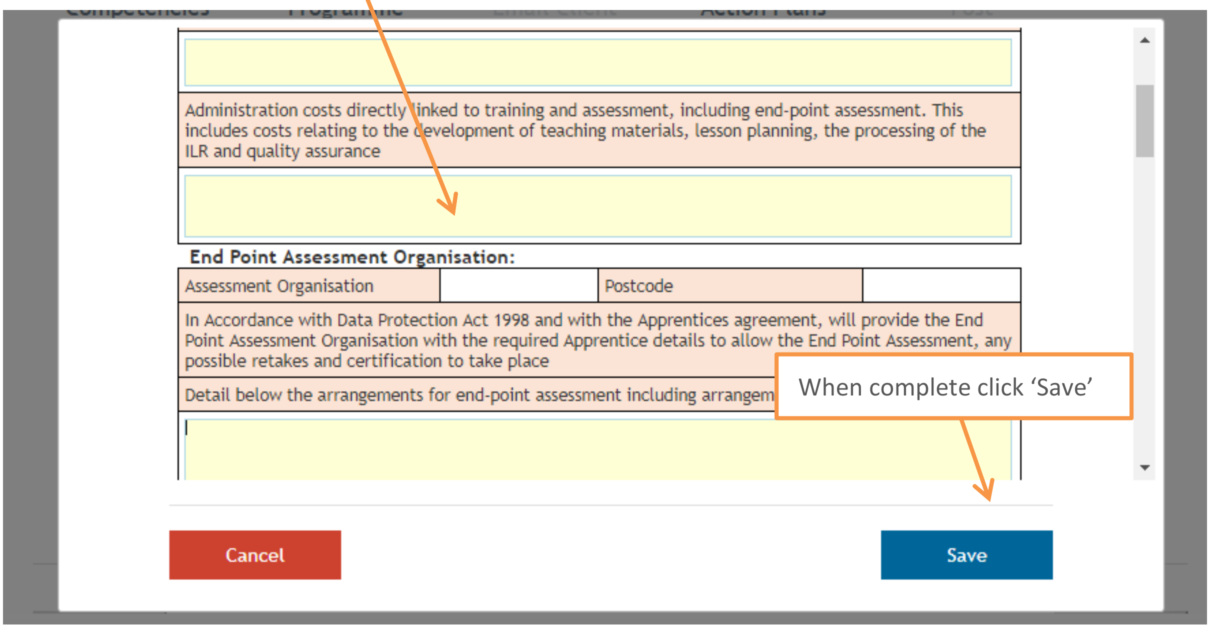
1. Sign into your account, and locate the profile page for the relevant user.

2. Within the '*Compliance documents*' section of their profile click on 'Create' for the relevant document. The document will be displayed in a pop-up window.

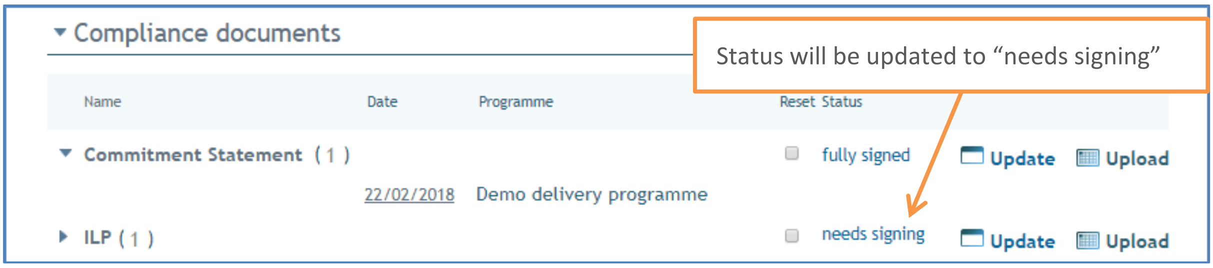
3. Fields within the document will be automatically populated where relevant information is available. These fields cannot be directly edited in the document. For example if the user's name is misspelt or details are incorrect then these will need to be changed by editing the user's profile page first (see section User Profile Report) before recreating the document by clicking on the relevant 'Create' link.

Other details such as programme details, learning activities and qualification aims will be automatically completed from the Aptem programme that the user is assigned to. If these are incorrect then these details will need to be amended – either contact your organisation's Aptem super administrator or the Aptem Support Team.



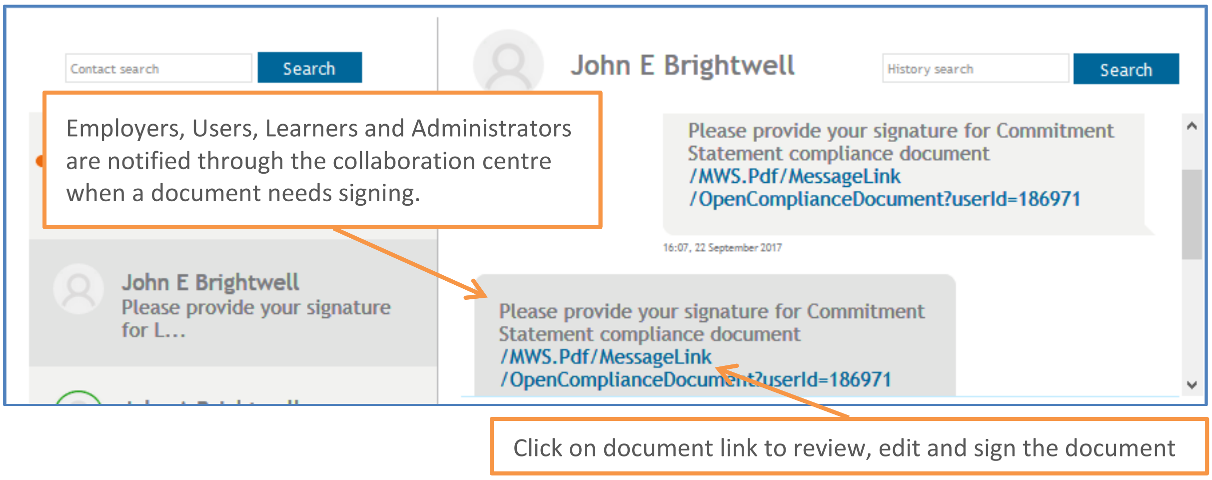


4. Once all relevant fields have been completed click on 'Save'. The electronic document will be saved against the learner's profile. The status for document in the Compliance Documents section will be updated, and the next signatory will be automatically notified through Aptem.

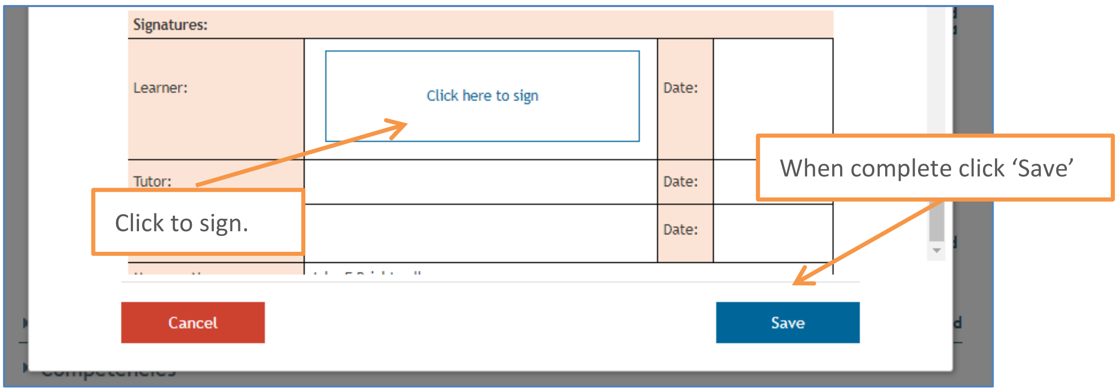


Notifying employers and users to sign a document

Once a compliance document has been created all signatories (e.g. the learner, their employer, their tutor) will be automatically notified in turn depending on who next needs to sign the document. Within Aptem the tutor or organisation's administrator is the last person to sign the document.



1. A notification will be sent via the Collaboration Centre, and the person will also receive an email informing them they have a new message.
2. When the signatory clicks on the link the document will be displayed. Depending on the document they may be able to edit or correct some information fields. These fields will be highlighted in yellow.
3. At the end of the document the user will need to click in the relevant box to sign the document with their e-signature and confirm their agreement.



4. Finally the user will need to click 'Save' to confirm their signature and any changes that have been made. An image of the users e-signature will be added to the document and the signature will be automatically stamped with the current date.

Monitoring the status of compliance documents

All Aptem users (administrators, employers, users/ learners) can review the status of available compliance documents that they are responsible for signing. Users can only access their own documents.

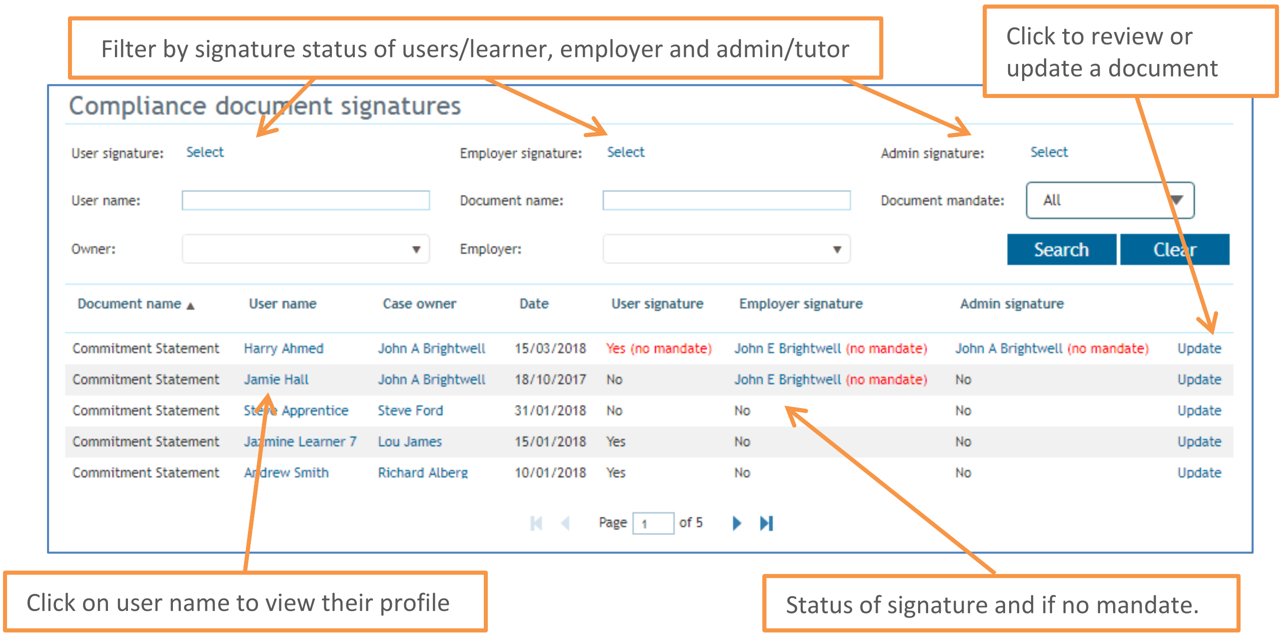
Monitoring signatures for Administrators and Employers

Administrators can check the status of users in their account. Employers can also check the status of compliance documentation for their employees.

1. Sign in to your administrator account.

2. In the Navigation panel click on the 'Signatures' tile. The Compliance document signatures report will be displayed.

3. The signature report shows the signature status for all compliance documents that have been 'created' for each user in your account. The list can be searched and filtered by user name, document name, signatory status and whether the e-signature mandate has been completed.



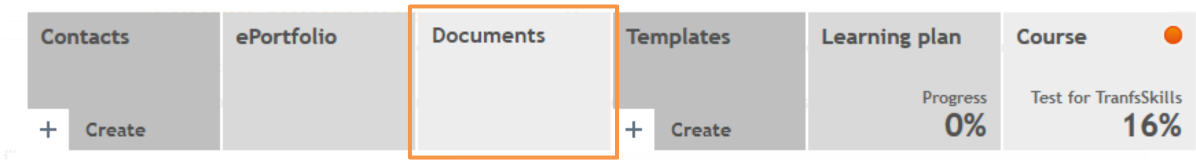
- Each of the columns ‘User signature’, ‘Employer signature’ and ‘Admin signature’ shows the signatory status of the specific document. There are three possible signature statuses. No: has not been signed; ‘Yes (no mandate)’ where an e-signature has been added to the document but the signature mandate declaration has not been uploaded; and ‘Yes’.
- The list can be searched by completing the relevant information and clicking on ‘Search’.
- Clicking on the ‘Update’ link for a document/user will display that document for review and signature.

Administrators and employers can use this report to find and sign outstanding documents that require their signature.

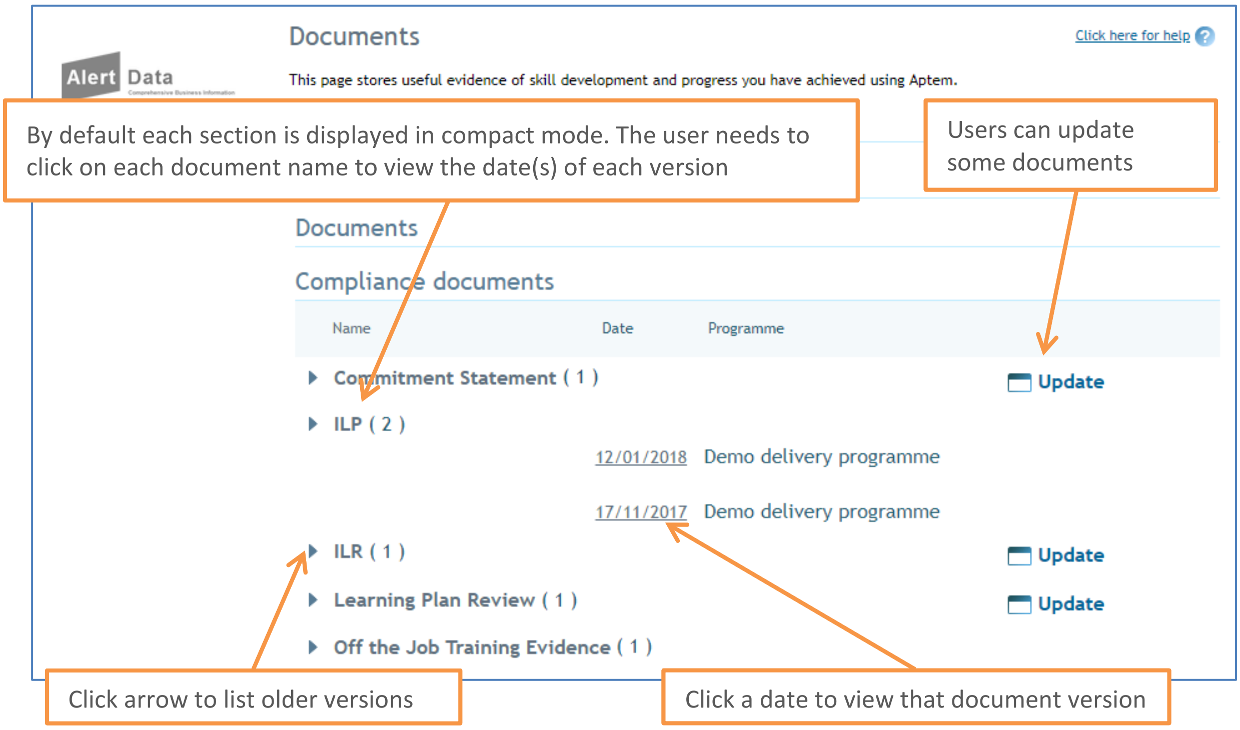
Monitoring signatures for users and learners

Users can check the status of their own compliance documentation by:

1. Signing in to their Aptem account and clicking on the ‘Documents’ tile in the navigation panel.



2. The Documents report lists all documents generated in their Aptem account. The ‘Compliance documents’ section lists the current and earlier versions of documents created for them.



Individual Learner Records (ILR)

Aptem has implemented the UK government's specification for the Individual Learner Record (ILR) to enable efficient collection of required data from colleges and training providers.

If enabled within your organisation's account the ILR feature will be enabled for all learners, or if available can be enabled through a programme for specific groups of users by enabling the ILR token in Programme Manager.

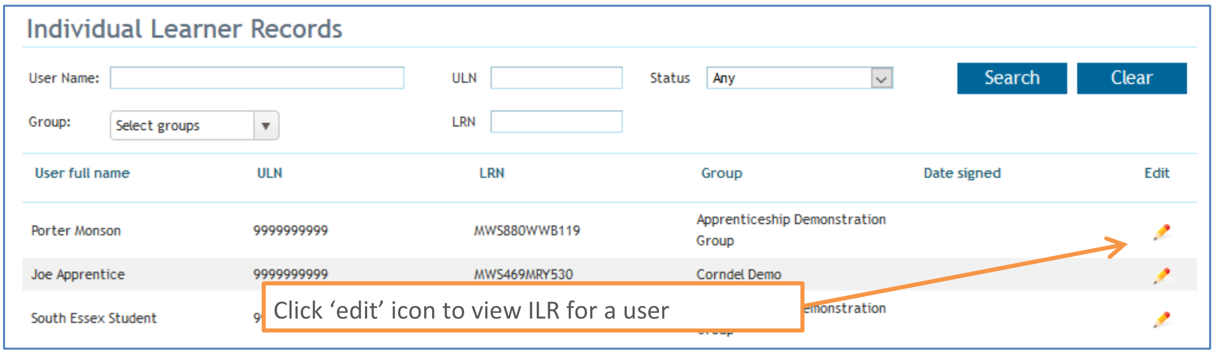
If the ILR is enabled then users will be able to partially complete the ILR when they access their Aptem accounts. Administrators can then review, edit, track and amend ILRs. The ILRs can be internally verified before being batch uploaded to the Education and Skills Funding Agency.

Reviewing and editing ILR records

1. Sign in to your administrator account and in the navigation panel click on the **ILR** tile which will display the Individual Learner Records page.

- The Individual Learner Records page lists all users in your Aptem account with an ILR.

  You can search for individual users by name, unique learner number, learner record number, and by status (Newly submitted, signature required, signed, QA verified, or completed).



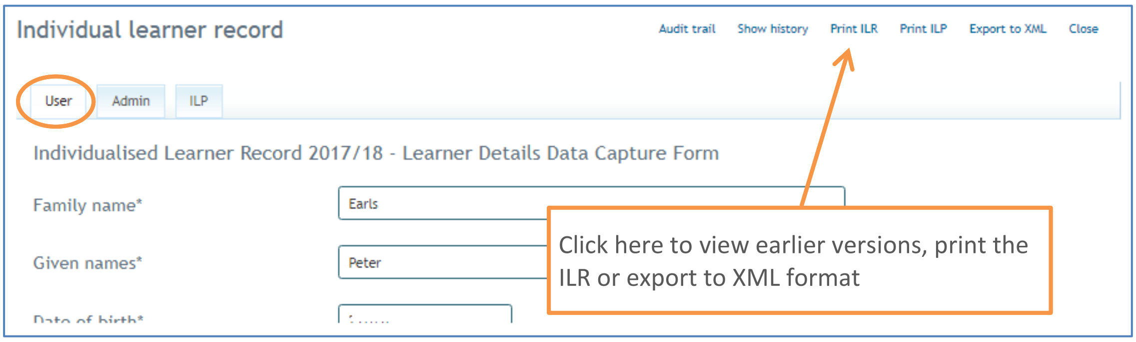
- Clicking the edit icon against a user's name will display the ILR for that individual.

The ILR page contains 3 tabs:

- User which displays the Learner Details Data Capture Form.
- Admin which covers the fields completed by the training provider including the capture of qualification aims and learner destination information.
- ILP (Individual Learning Plan)

All changes to the individual's ILR are tracked and previous versions are saved in XML format.

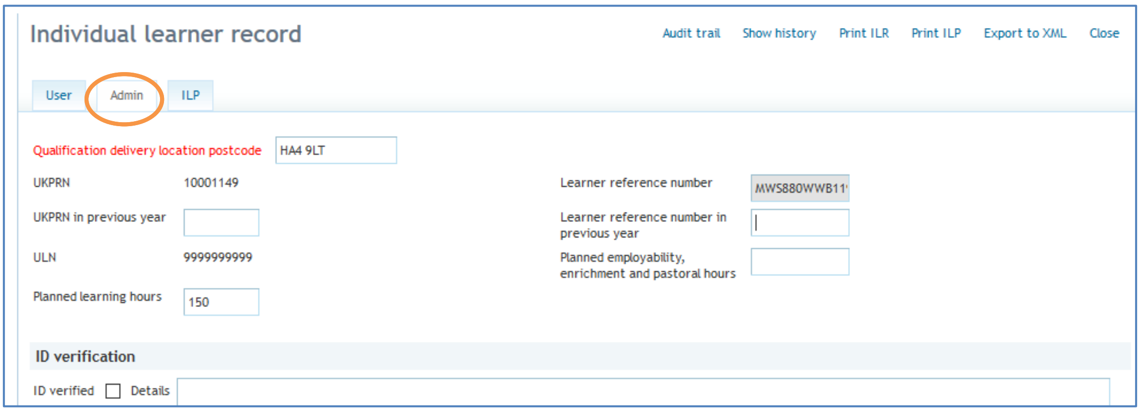
Learner Details Data Capture Form (User tab)



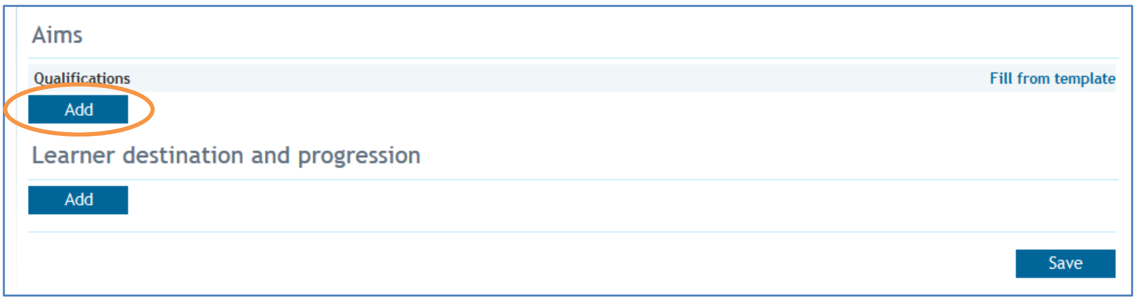
Qualification and provider details (Admin tab)

The Admin tab displays ILR sections for training provider administration, including ID verification, next of kin, learner funding and monitoring, and sections to add qualification aims and learner destination information to the ILR.

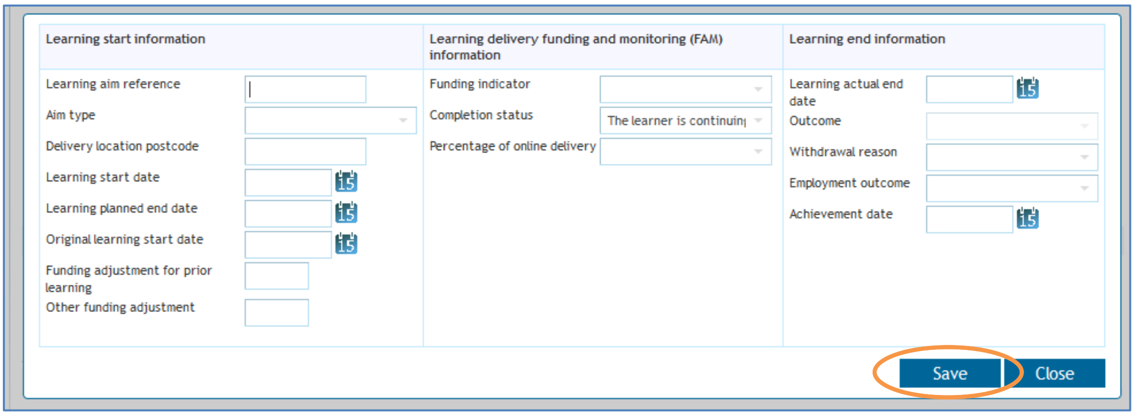
Note that for a specific learning programme these details can be prepopulated – but changes must be made on each individual ILR.



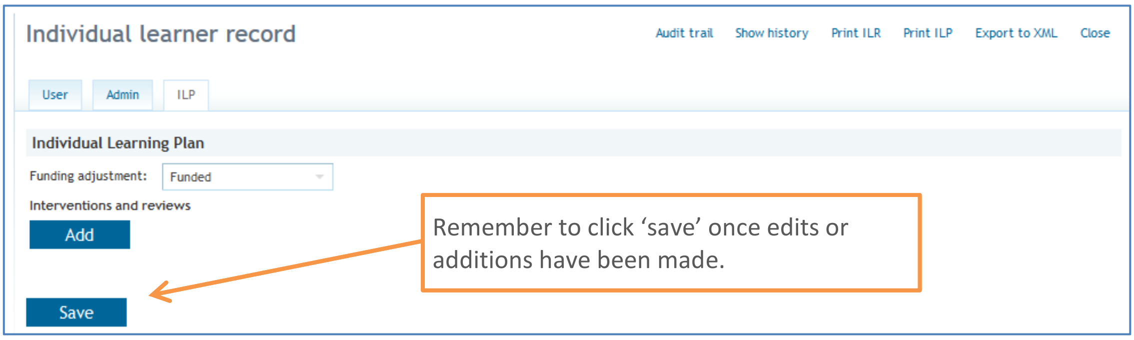
To add a qualification aim to the ILR, scroll down to the bottom of the Admin tab and click on the 'add' button.



A screen will be displayed which is used to collect the required learning start, delivery and end information. Complete the relevant information and click on the 'Save' button.



The ILP tab displays the Individual Learner Plan for the user. Learner specific interventions and reviews can be recorded here.

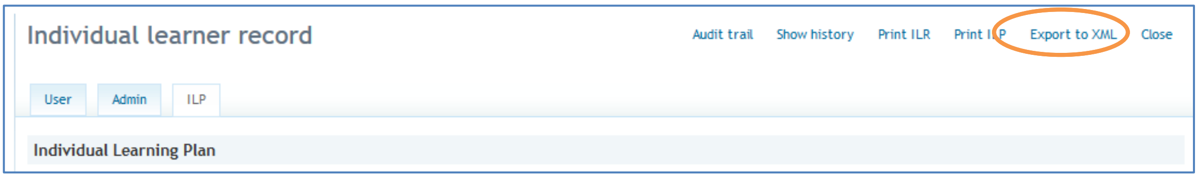


Exporting ILR records to XML

Aptem can automatically generate the official XML format for the review of individual learning records and batch uploads to the ESFA.

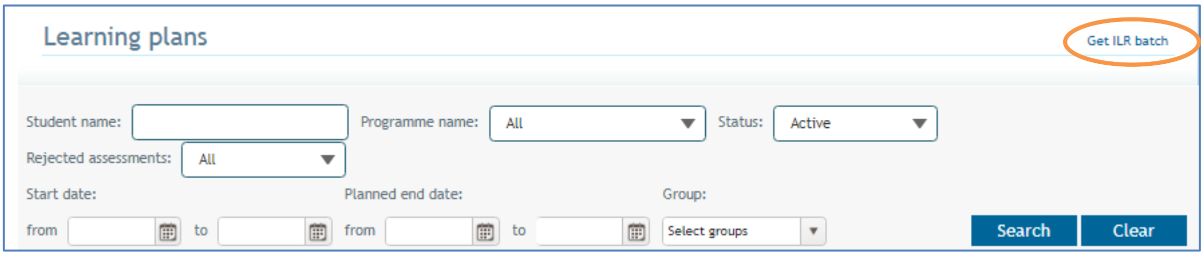
To generate the XML file for an individual:

- Follow the steps in the previous section to access the Individual learner record page for a learner.
- Click on the Export to XML link. This will download an XML file to your computer, which can be viewed as a text file or by XML reader software.



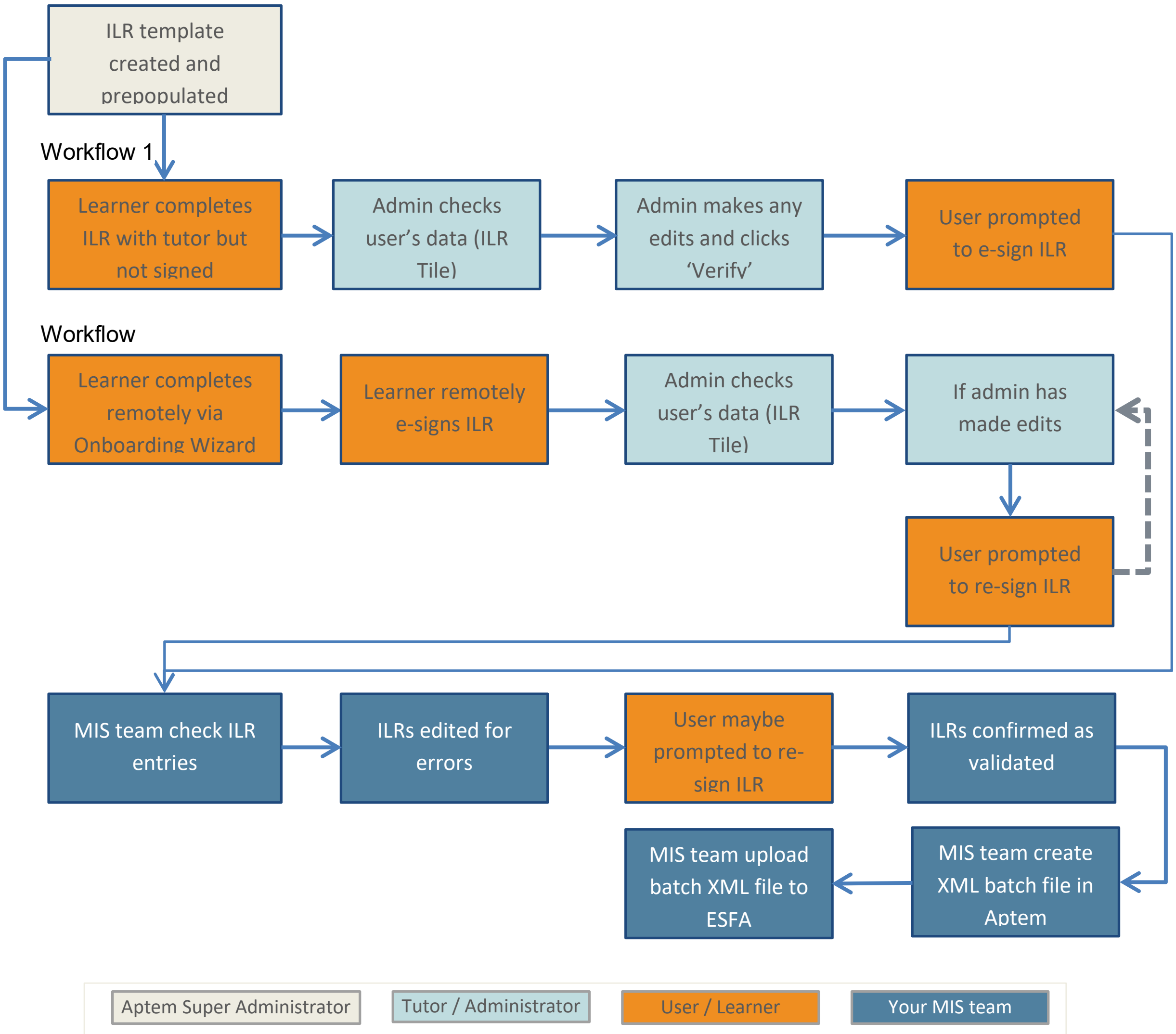
To generate a batch file for upload to the ESFA (this feature must be enabled in your account).

- In the navigation panel click on the '**Learning plans**' tile.
- Use the various filters to select the required learners, next click on 'Get ILR batch' and an XML file will be generated and downloaded to your computer. This file can be uploaded to the ESFA Hub.



ILR work flow within Aptem

There are two potential work flows for managing ILRs within Aptem, depending on whether the user initially completes the ILR with the tutor or remotely. This is shown in the following flow chart.



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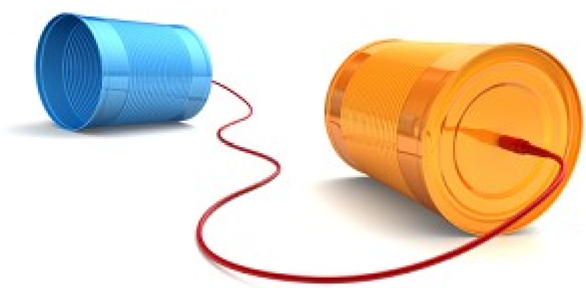
or you can visit www.mwstechnology.com



Appendix A: Setting up an account for a user

This section explains how to create an Aptem account for a user.

There are three methods for creating a new user account within Aptem, depending on the features available in your administrator account:

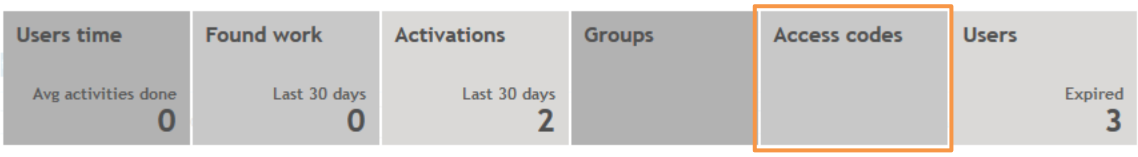
- Invite a person by manually sending them an access code.
- Invite a person using the “Create new user” feature.
- Upload a list of people to invite them to Aptem.

The first method requires the user to register their email address with Aptem. The other two methods automatically create accounts and sends an activation message to the user’s email address.

Method 1: Access Codes:

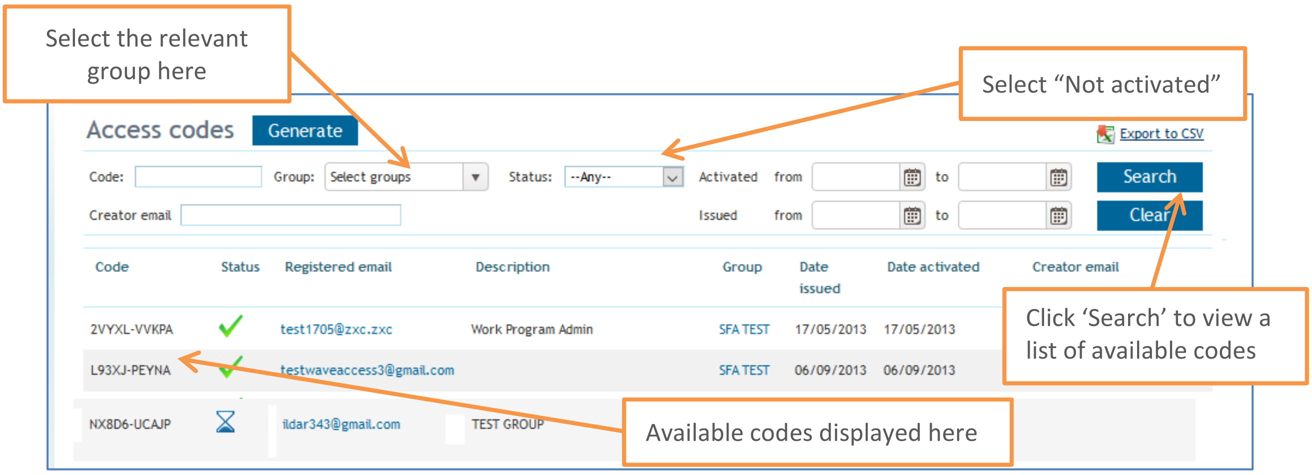
Use this method if your organisation has purchased a set number of access codes. Users will need to register their email address and choose a password on the sign up page, then use their access code after they have activated their account.

1. Sign in to your administrator account.
2. In the Navigation panel click on the Access Codes tile.



3. The Access Codes report will be displayed.

   a. Filter the codes by using the “Group” filter, if needed, to find codes for the required group within your account.
   b. From the “Status” list select ‘Not activated’.
   c. Click the Search button to display a list of unactivated codes for the required group.
   d. A list of available access codes will be displayed. Copy an access code from the list and communicate the code to the user with instructions for them to sign up their email address at www.aptem.co.uk. They will need to click on the link “Click here to register with an access code” sited at the top of the left hand panel. After creating an account with their email address. They will then need to enter their access code after activating their account.

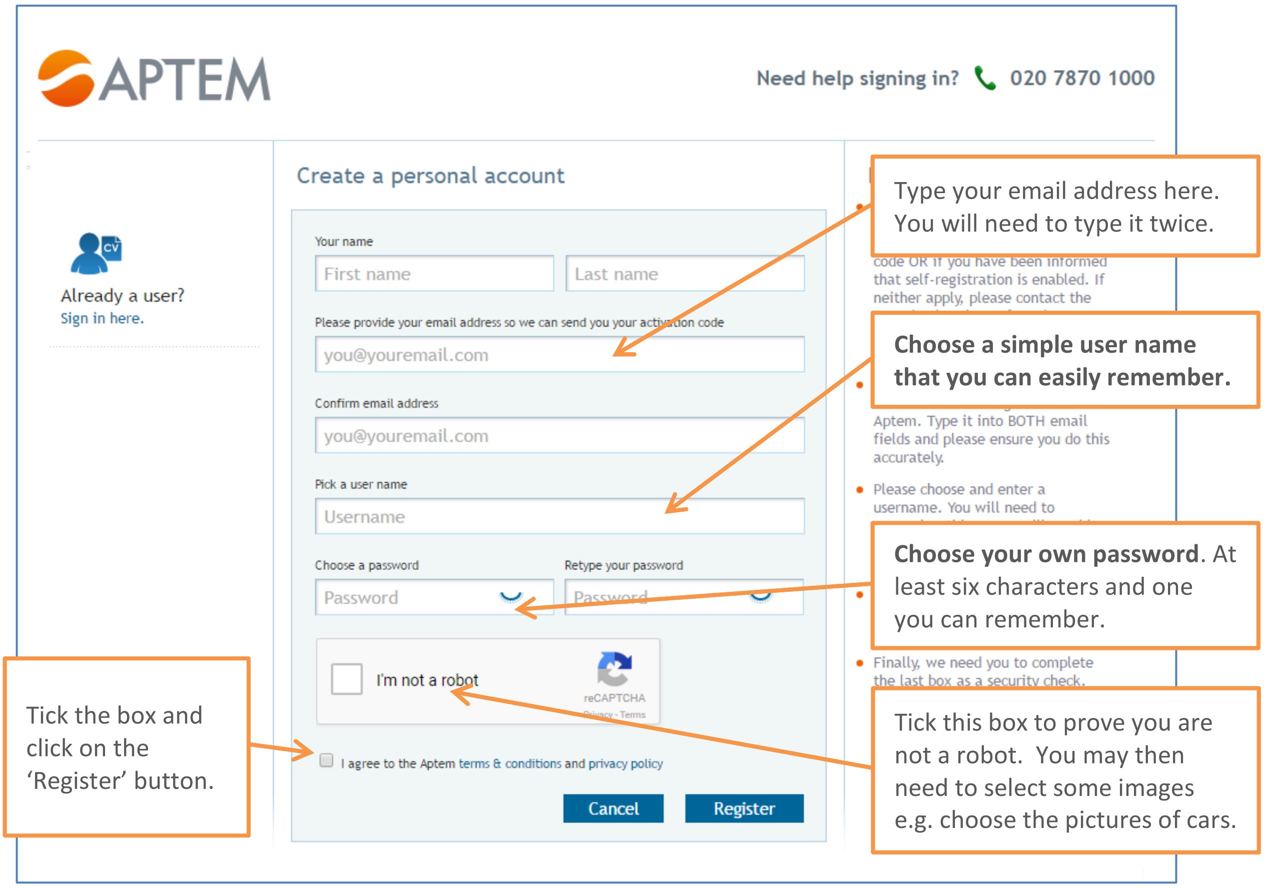


Note: Clicking on the 'Export to CSV' link saves the list of available access codes. For more details please refer to the section managing access codes

4. Next forward the access code to the user, so they can create an Aptem account.

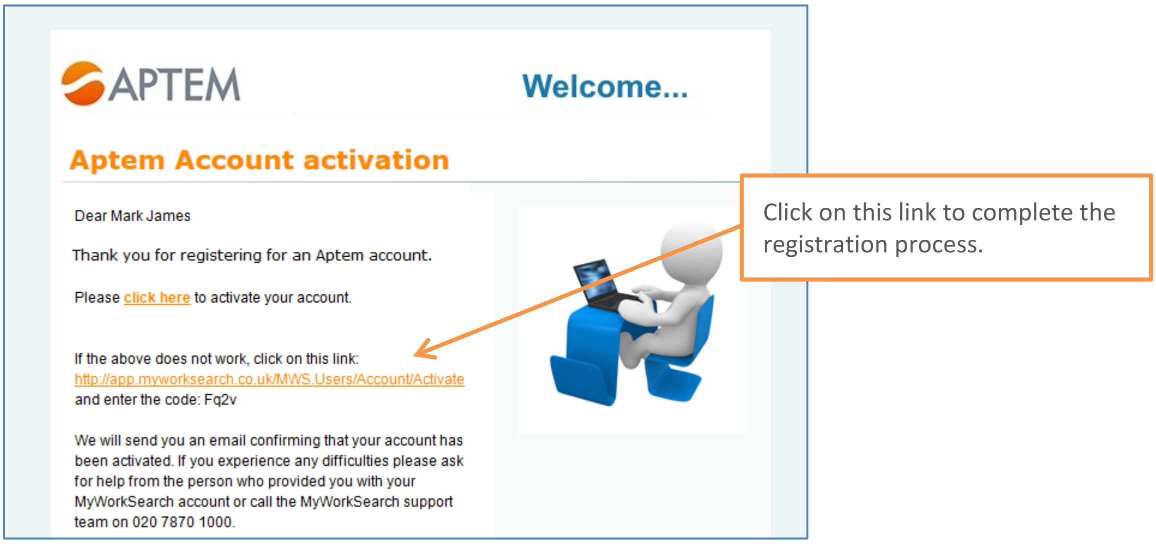
User creates an Aptem account

The user will need to use a web browser to enter their details into the Aptem sign-up page at www.aptem.co.uk in order to register an account.



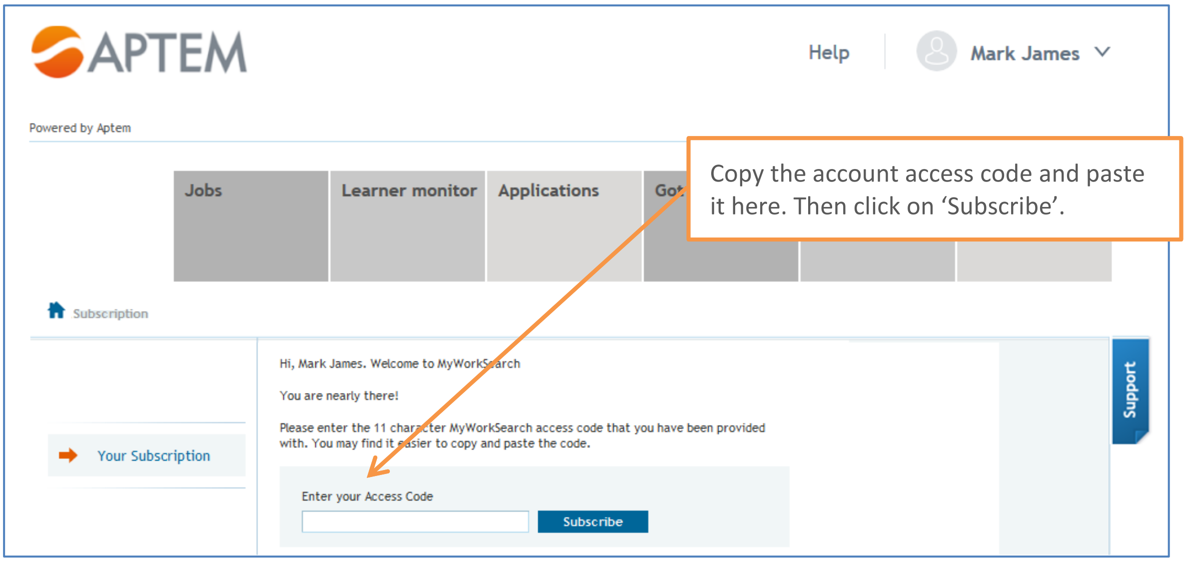
The user must now check their email account for an activation email. The subject line of the email will be "Aptem Account Activation".

This email contains a link that confirms the user's or user's email address. They will need to click on this link to complete the registration process and later enter the access code you have provided to them.



After clicking on the activation link the user will be shown the Aptem login page and a confirmation message that registration was successful. The user should then sign in using the same username and password combination they chose during the registration process.

To use Aptem the user will need to enter the **11 character access code** you have given them. To avoid errors we recommend copying and pasting the code into this page.

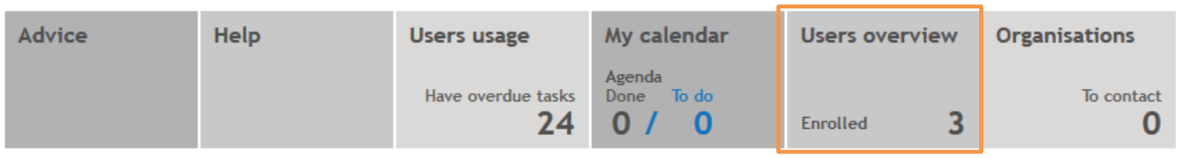


The user then clicks on the "Subscribe" button and this activates their account. They will be asked to complete further screens called "About You" and "How we can help" before accessing their home page.

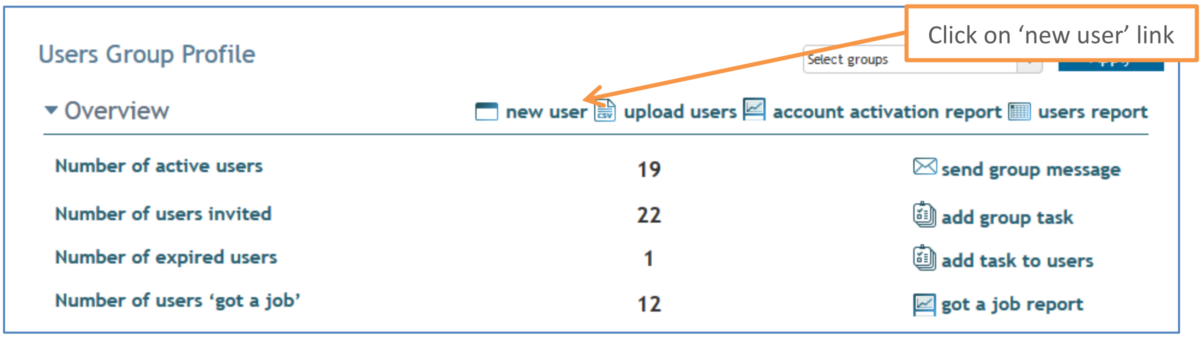
Method 2: Create an account for an individual user

Use this method if you have permission to create an unlimited number of Aptem accounts.

1. Sign in to your administrator account.
2. In the Navigation panel click on the ‘Users Overview’ tile to display the Users Group Profile page.

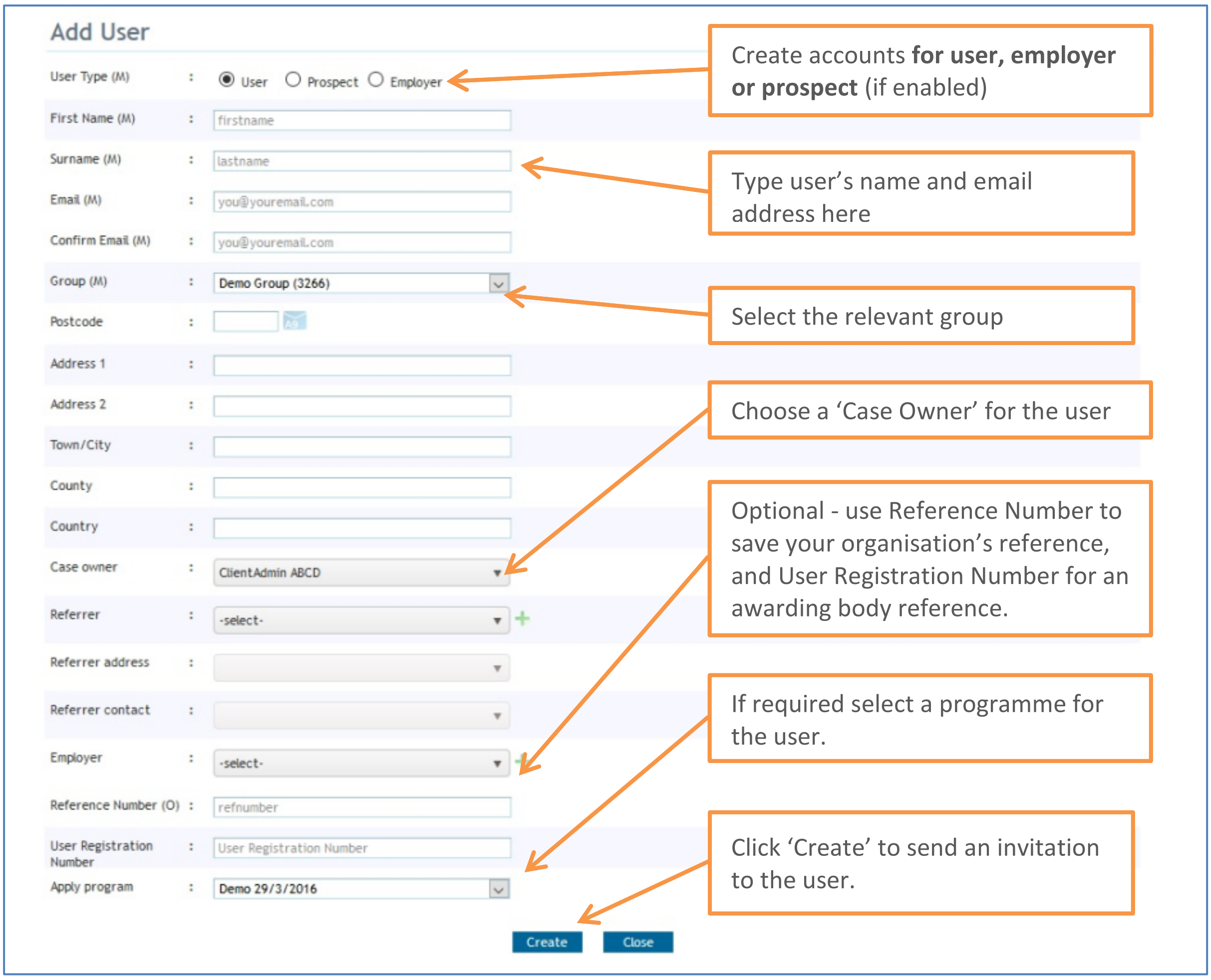


3. In the Users Group Profile click on the ‘new user’ link.



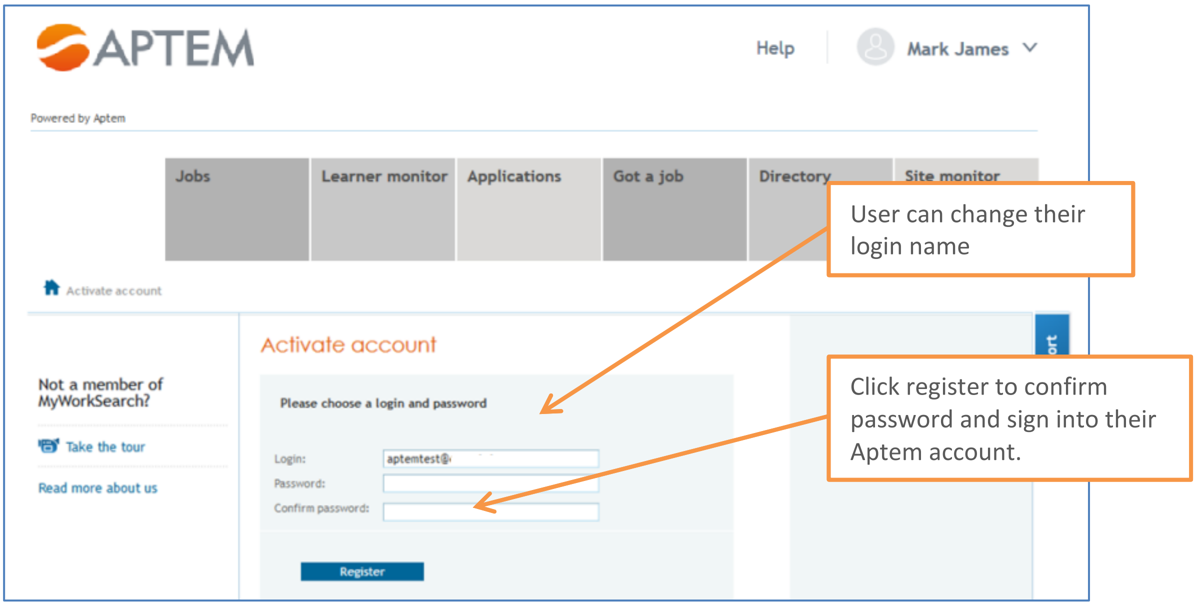
Note: an alternative is to click on the Users tile to view the Users Page and then click on the ‘Create’ link.

4. The ‘Add User’ page will be displayed.
   a. You will need to select ‘User’ from the user type options. If enabled your account may also allow you to create administrator accounts or accounts for employers or prospects to check progress of their employees/placements.
   b. Enter the user’s first name, last name and email address, and confirm the email address.
   c. Select the group, if appropriate, to which the user should be allocated.
   d. Complete the address fields and other contact information for the user.
   e. By default the administrator creating the new user account will be assigned as the case owner for that user. If you wish the user to be assigned to another person within your organisation then select their administrator account from the case owner dropdown list.
   f. If your organisation is using Aptem on behalf of a third party referral organisation, then the select the organisation and branch from the ‘Referrer’ list in order to associate the user with the referral organisation.
   g. Optional. If needed use the reference number box to store your organisation’s id number for the user. The ‘user registration number’ can be used for an awarding body reference number and will be printed on any course reports.
   h. If required, choose a Programme for the new user. Programmes allow access to specific Aptem features and activities in a structured way that mirrors your organisation’s processes. If a programme is selected then user will automatically begin the programme when they log into their account.
   i. Finally click on the ‘Create’ button. This will create the account and send an activation email to the user.



- The user must now check their email account for an activation email. The subject line of the email will be "Aptem Account Activation".

  This email contains a link that confirms the user's or user's email address. Clicking on the activation link will display the Activate Account page where the user must provide a password for their account. They can also change their login name.

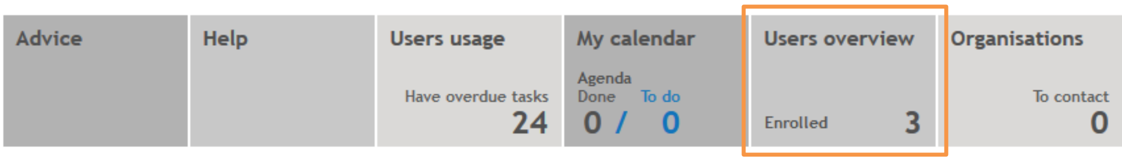


Method 3: Create accounts for a batch of users

You may use this method if the bulk upload function has been enabled for your account. This function allows you invite a list of users en masse to activate an Aptem account, and is more efficient than individually entering each person's details as in method 2 above.

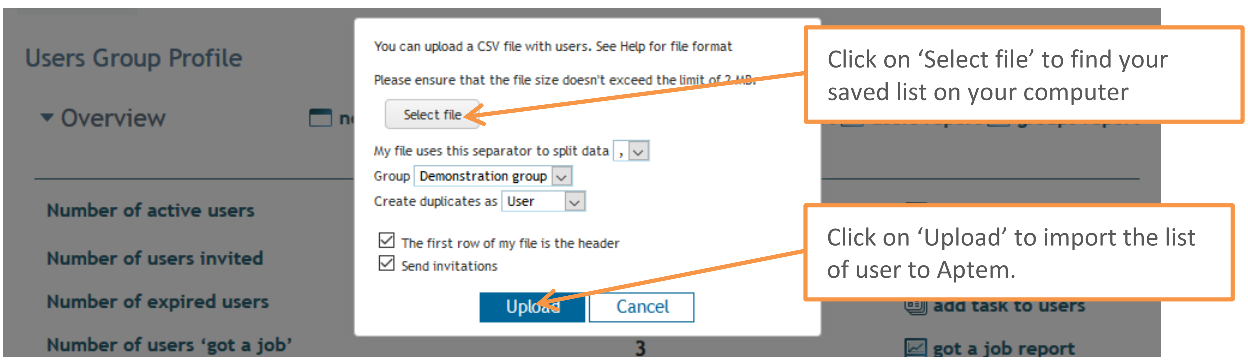
1. Using Microsoft Excel (or similar software) create a list of the users' details as follows, with the following columns: First Name, Last Name, Email, Reference Number and Group.
    a. Label the columns: First Name, Last Name, Email, Reference Number and Group. A sample template is available from the Aptem support team.
    b. Enter details using one row per person. Check that there are no spaces in the email addresses. Note that the Reference Number column can be left blank.
2. Save the file using CSV file type shown as "CSV (Comma delimited) (*.csv)" in Microsoft Excel's save as list.

3. Sign in to your administrator account.
4. In the Navigation panel click on the 'Users Overview' tile to display the Users Group Profile page.



5. Next click on the 'upload users' link.

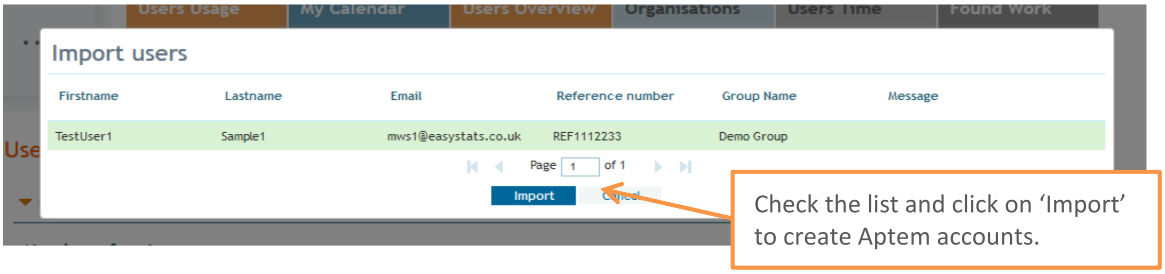
6. The upload window will be displayed.



    a. Click on the select file button and browse to the saved list of users (CSV file) on your computer. If the group column is empty for any of the users then they will be added to the

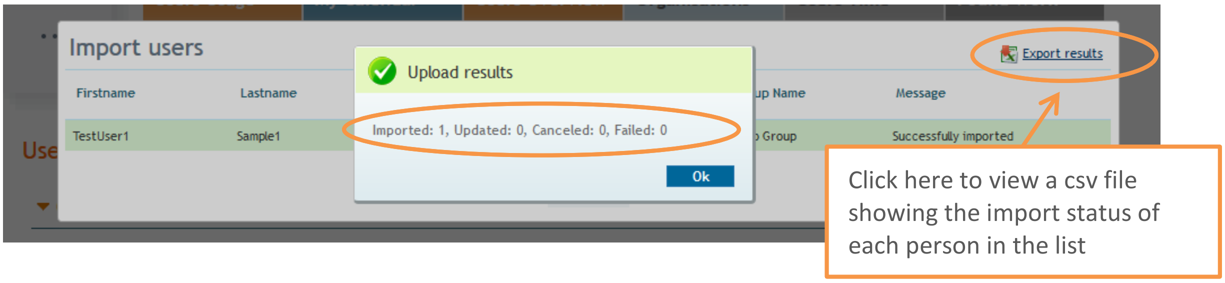
group shown on the screen – this can be changed by using the dropdown lit.
If you do not want email invitations to be automatically sent out to the new users then untick the 'Send invitations' box. Next click on the 'Upload' button.

b. The information in the CSV file will be processed and displayed onscreen for you to check before proceeding with creating accounts for each of the individuals in the list.



c. Click on 'Import' to confirm that you wish to create Aptem accounts for each person in the list.

d. A confirmation message will be displayed stating how many people were imported. An account will be created for each person on the list with a valid entry. If the 'send invitations' box was ticked then each person will receive an activation email. They will need to click the in the email and create a password for their account (see Method 2 above).



e. Click on 'OK' to finish.   You have the option to view a confirmation report of people uploaded to your account. Click on the 'Export results' link to open a file showing the status of the upload. You can check if there were any errors which prevented an invitation being sent. For example, missing name or email address, an invalid email address, or if an email address in the list had previously been used to create an Aptem account.

Issues with account subscriptions

The process for opening an Aptem account differs slightly depending on whether the user or an administrator registered the account:

User registers an account: (Method 1)

User receives **access code** (via email, text or telephone). → User enters details (name / email) at sign-up page. → User receives an email with a link to confirm their email address. → User signs in and uses their **access code** to access Aptem.

An Advisor registers an account using either “Add user” or “Bulk upload” process (Method 2 or 3):

Advisor uploads or enters User(s) names and email address → User(s) receives an email with a link to confirm their email address. → User clicks on email link to create a password and access their account.

All Aptem users will receive an activation link via email. **Only after they have confirmed their email address** by clicking on the link will they be able to sign into their Aptem account.

See below for a list of solutions to typical issues encountered with account activation.

Does the user need to register with Aptem using the same email address that received their access code?

No, the user is free to choose their preferred email address for registering with Aptem, even if they received the access code at a different email address.

If the advisor created the account then the activation email will be sent to the email address stored in Aptem. After logging into their account the user can click on ‘Account Settings’ beside their name located top right of the screen to change the email address associated with their account.

A user has not received their ‘confirm my email address’ email.

Account confirmation emails are automatically sent to the email address that either (1) the user has typed into the sign up page, or (2) the advisor has typed in the ‘Add User’ page.

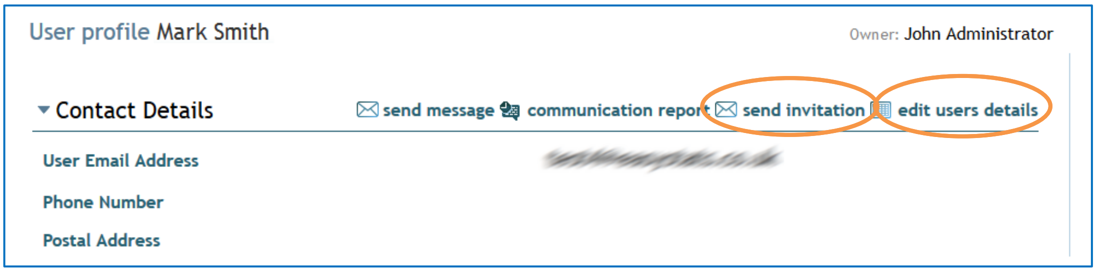
If the user self-registered then:

- Firstly ask the user to check the junk or spam folder of their email account.
- Ask the user to sign in at http://login.Aptem.co.uk using their chosen user name and password combination. If the account has not been activated then an option to resend the activation email will be displayed.

- If the user still does not receive the confirmation email then it is likely that they have mistyped their email address.   They will need to go to www.aptem.co.uk, and click on the link "Click here to register with an access code" sited at the top of the left hand panel. They will need to start again by entering their name and correct email address, and choosing a new username and password. The user will not be able to use the same username as before – but their unused access code will still be valid.

If an advisor registered the account then:

- Firstly ask the user to check the junk or spam folder of their email account. Note that if the user has a Gmail account they should also check the 'Social' and 'Promotions' tabs.
- Check that the correct email address has been used.
- Use the Users Report to search for the user, then click on their name to view their profile.



Check that the user email address is correct. If not then click on 'edit users details' to change the email address.
Next click 'send invitation' this will send a new activation email to the email address provided.

A user has forgotten their password and cannot log into their Aptem account.

From the Aptem login page http://login.Aptem.co.uk the user can click on the "Forgotten password" link. They will then be able to enter either their username or email address to receive an email containing a link to reset their password.

A user has forgotten their Aptem username and cannot log into their Aptem account.

If a user cannot remember their username and has lost their original activation email they can use the username recovery link on the login page. Alternatively, they can contact the Aptem client support team on 020 7870 1000.

A user has lost their access code.

A user cannot fully activate their account without the access code. If they do not have their access code you can retrieve it from the Access Codes report in your advisor account if you know the email address used to invite them.

Sign in to your tutor/advisor account. Click on the 'Access Codes' tile. Select the access code status as "Not Activated". Then search for the user using part of their email address. Any matching unused access codes will be displayed.

A user no longer has access to the email account they used when registering with Aptem.

Using the Users Report in your administrator account check that you can see the individual among the list of users and the associated email address. If you are able to authenticate the identity of the user then you can change the email address to the user's new email address. See the section Managing Users within your account for more details.