Broker ASSESS manager’s guide

Your home page
As a manager, you will have an additional area on your Home page called **My Staff Activity**.

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**Glossary**

**Portlet**
A window which retrieves data from another part of ASSESS to provide you with quick access to the areas you most frequently use.

**Activity**
A module on ASSESS which could be either a piece of reference, learning or assessment.
My Staff Activity

The My Staff Activity portlet provides you with an overview of your staff and their outstanding activities. Selecting the staff member's Name will open up their profile, while selecting the Outstanding Actions next to their name will take you to the individual's training activity on your Staff Activity page.

<table>
<thead>
<tr>
<th>Name</th>
<th>Outstanding Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Daiz</td>
<td>Outsourcing and Off-shoring</td>
</tr>
<tr>
<td>Standard User</td>
<td>2 activities</td>
</tr>
<tr>
<td>Cole Dewinter</td>
<td>3 activities</td>
</tr>
<tr>
<td>Honey Polis</td>
<td>2 activities</td>
</tr>
</tbody>
</table>

Selecting the My Staff Activity heading will take you to your Staff Activity page.

Red - past due date for completion
Orange - in progress
Grey - not started
Staff Activity page – basic functions

Select the **Staff Activity** link in the **Menu** or click on the **My Staff Activity** portlet heading to open.

This page displays a list of all your staff and their current activity.

When you first view your **My Staff** page it shows the activities assigned to all your staff. By default **Programmes** are shown as a single entry (Group by Programme) and sorted by **Due Date** and which aren’t completed (status on left defaults to **Outstanding**).
Staff Activity page – staff functions

Select an Activity Name to view the full To Do list for that member of staff.

Add or edit an existing Due Date for the activity.

Red - past due date for completion
Orange - in progress
Grey - not started

Selecting a Name will take you into their Profile.

Expand to show further information about the activity.

Activity Due Date – adding, changing, removing

If no Due Date has been set then the word None will be displayed.

If you wish to edit the due date for an activity then click on the date (or None to add one).

To remove a due date, click on it and select No planned end date.
Filtering and managing large lists
The default view will not show completed activities.

To view completed activities change the Status drop-down to Completed.

Alternatively, select All from the drop-down to view all activities whether not attempted, in progress or completed.

Other staff actions
If you select a staff member by clicking the tick box to the left of their name, the Add button and Actions drop-down (located above the list of staff) will become active.

The Add button will enable you to add an activity from ASSESS to that member of staff or create a New Personal Offline (i.e. CPD) Activity for them.

The Actions drop-down enables you to cancel a registration (i.e. delete an activity from the staff member’s To Do list) and provides an alternative way to change the due date for an activity.

Find Learning – allocating content
The library of available activities on the system can be located via the Find Learning link within the Menu or by clicking on the Find Learning portlet heading.
Once you have located the required learning activity, click on the **Common Tasks** link to the right of it to access the **Common Tasks** page illustrated below (shown with the left hand and central menus displayed).

To register a new user or group of users onto the activity, either select the **Add users** link from the **Common Tasks** central menu or select the green **Register** button above the list of staff on the **Users** page.
Adding users
You will then be taken to a three step registration wizard,

On the final step of the wizard you have to state the rules for existing registrations (if applicable) and decide whether or not you wish to enter a due date for the completion of the activity. You can choose to ignore both options and click Finish to complete the registration process or select as appropriate.
Set reminder emails
You can send out emails in relation to a learning activity to a specified group of people.

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

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

Complete the fields as required. You can use the Custom fields options when you wish to enter variable information into the email so that, for example, the recipient name will automatically populate depending on who the email is being sent to.

The Rules step of the wizard will determine who receives the email. Edit at least one of these options as applicable before progressing to the final step to select how regularly you wish to send the email.
My Staff

The My Staff page lists all the staff that report to you and can be accessed via the Menu.

Filter to view either those that report directly to you (default) or all staff that report to you

View and amend their profile

Staff profile

Via the staff member’s profile you will be able to:

- view their personal Details
- view their Employment Details
- amend Settings such as their CPD year and email reminders
- upload relevant Documents to their profile
- view their To Do List and register them onto activities
- view their CPD Log, add and amend CPD activities
- view Categories assigned to them.
Reports
To access, select the Reports link under the Menu.

The reports can show how many attempts have been made on a particular assessment or what activities have been completed.

Running a report
From the Reports page you will have access to a set of pre-configured reports which you can run at any time by clicking on the report name.

Filter the results of your report, for example to only show assessments not attempted, by selecting from the drop-down and/or typing text into the fields available, (e.g. show only Activity Names containing the word Agency). Click on Run Report again to update the results.

You can also export a copy of the report, choosing the format via the drop-down menu, and then clicking on Export.
Schedule a report
You can schedule a report to run and be emailed to you or another member of staff on a set date and time.

On the Reports home page, select the Schedule Emails option which appears to the right of each Report (this feature can also be accessed from a report by clicking on Email Report).

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

Step one - filters
On the first step of the wizard you can choose any filters for the report. Click Next to choose who to send the report to.

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

Step three - frequency
Set the report to run at a single date in the future or to run on a regular basis starting from a set date and time. Once you have chosen, select Finish.