Broker ASSESS user’s guide

Your home page

If there is more information and/or further functions available for a portlet then clicking on the portlet heading will give you access to the full information and all functionality.

You can navigate to any part of ASSESS by clicking on **Menu** next to the Home button, top left. A drop-down menu will appear and you can then click on the area you want.
Glossary

Terminology

<table>
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<tr>
<th>Portlet</th>
<th>A window which retrieves data from another part of ASSESS to provide you with quick access to the areas you most frequently use.</th>
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<td>CPD</td>
<td>Continuing Professional Development.</td>
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<tr>
<td>Activity</td>
<td>A module on ASSESS which could be either a piece of reference, learning or assessment.</td>
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Types of activity available in ASSESS

- **Reference**
  - Learning module that offers information in a text format. Can be sent to you a page at a time by email.

- **Learning**
  - Interactive learning module that includes multiple choice questions after each section.

- **Case Study**
  - Simulation of events in a business environment to help you put your learning into context.

- **Assessment**
  - A test consisting of multiple choice questions.

- **Programme**
  - A combination of learning material (reference, learning, case study) and/or assessments.
Finding and registering for activities

Browsing and filtering
Begin browsing the full library of activities by clicking on the relevant heading in the Find Learning portlet.

Whilst browsing the activities you can filter by Course Format, Level or Discipline by clicking on the appropriate filter link on the left hand side of the page.

For example, if you are in Product Line and click on Case Studies, you will see all the case studies within Product Line.

If you click on the title of an unregistered activity you will be able to see its full description.

Searching and filtering
Another way to find activities is by searching. This searches the activities’ title, description, learning outcomes and keyword information. Search results can be filtered as above.

Registering
Once you have located an activity you want to do, click on the Register button to the right of the title.

You can set a due date for all activities.

Some activities, such as case studies and reference activities will also provide you with the option to send the material to your email address.
If you return to your Home page, you will see the courses you have registered on in your To Do List.

**Accessing an activity**
Once you have registered on an activity, you can immediately access the activity by clicking on its title.

You will see that the Register button has been replaced with a progress status label. The typical status progression is:

- **Not Attempted** - you haven’t begun the activity
- **Incomplete** - you’ve accessed the activity but not finished it
- **Complete** - you have successfully finished the activity.

Activities with a status of **Not attempted** or **Incomplete** will also be available to access directly from the **To Do List** on your Home page.
To Do List

Your current activities are displayed in the To Do List portlet on your Home page.

Your To Do List will display any activities you have self-registered for along with those which your ASSESS administrator or your supervisor has allocated to you.

If an activity has been set with a due date, you will see this date beside the activity. If the due date for an activity has passed and the activity has not been completed, the date will appear in red.

Once you have successfully completed an activity it will be removed from your To Do List.

To view all your activities, including those that you have completed, click on the heading or select To Do list from the menu.

Send learning via email

Select the Send by email icon beneath the activity title and set a start date for when you wish to start receiving the material and from which page you wish to start.

You can also choose whether you wish to receive a page seven days a week or just on weekdays.

Setting reminders

You can set email reminders for your training activities. To edit your email preferences, go to the Profile link in the top right of your screen and select Settings from the left hand menu.

Select the Send To Do List/Training Plan emails checkbox then select the frequency (daily, weekly or monthly) you wish to receive the email reminders.

Select Update to save changes.
Recording and managing Continuing Professional Development (CPD)

Setting your CPD year start date
Your Continuing Professional Development portlet will prompt you to set up your CPD start date. Once set this can be updated by clicking on the chosen date.

Automatically recorded activity
Once you complete an activity within ASSESS it will be added to the Incomplete CPD portlet.

To make an activity count for CPD you will need to add a reflective statement which explains how you found this activity useful in your development.

Click on the Edit button to add this information.

Adding other activity
You will need to manually add any CPD activities you complete outside of ASSESS, for example, attending training courses or conferences.

The Current Status field above the dial will remain as Incomplete until you have recorded either 35 hours of completed structured CPD activity or a minimum of 21 hours completed structured and 14 hours completed unstructured activity, at which point it will change to Complete.

Clicking on the Add CPD Activity button lets you record the details of the activity.

You must complete all the mandatory fields, indicated with a red asterisk*, then click the Add button for it to count on your CPD log.
CPD Log
To print, download or view historical CPD activity, go to your CPD Log which can be accessed by clicking on the CPD Log link under the Menu or by clicking on the Continuing Professional Development portal heading.

To remove an item of CPD, select the cross to the right of the activity. Any removed CPD activities can still be accessed under the Removed CPD button in the Actions box. To reinstate an activity, select it by clicking the checkbox next to the activity then select the Reinstate Activities button.
Activity and progress reports
You can run reports on your activity within ASSESS by selecting the Reports link from the Menu.

Using the My Assessment Results report as an example:

- Leaving the Assessment Name filter blank will show all assessments.
- The information can also be filtered to only show assessments you’ve passed, for example, by selecting the appropriate filter within Success Status.

You will need to start using ASSESS in order for the reports to show meaningful information.

Reports can also be scheduled to run automatically and emailed to you. Click on the Email Report link to set this up.

The reports can also be exported in a number of formats for use outside of ASSESS including CSV, Excel and PDF.
Profile
You can access your Profile using the link in the top right of the Home page.

Settings
You can also change your CPD start date here (or by clicking on the date in the CPD portlet on the home page) and set up regular CPD status emails.

If you wish to receive regular reminders about learning activities in your To Do List, tick the checkbox under the Reminder Email Preferences section on your Settings page and choose the frequency and day of the month.

Click on the Update button beneath the sections to save your changes.

Password
To change your password, select Password from the left hand menu.

You are required to enter your current password in the first box, the new password you wish to change it to in the second box and then confirm your new password by typing it again in the third box.

Once you have completed the three fields, select Change to save your new password.