

e-skills Passport Office Guide for Managers and Administrators

A guide for training managers and administrators sponsoring and setting-up e-skills Passports for individuals in an organisation



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1. What is e-skills Passport?

e-skills Passport is a comprehensive e-skills learning management system that enables individuals and organisations to assess IT skills, identify gaps, set learning targets and record improvements.

e-skills Passport is split into two parts:

- www.e-skillspassport.com – where e-skills Passport holders go to register, complete self-assessments, add qualifications, view targets and plan learning.
- www.e-skillspassport.com/passportoffice - where administrators and managers go to manage e-skills Passports across their organisation, configure the framework, manage users, set targets, define training, view instant reports and complete many more functions.

At the heart of e-skills Passport is an employer-defined framework of skills, which is linked closely to the IT user National Occupational Standard, upon which most IT training in the UK and all UK IT qualifications are based. The self-assessments and targets that can be set within e-skills Passport are based on this framework of skills.

Organisations use e-skills Passport to get a snapshot of workforce IT and subsequently improve IT skills. If you wish to set users a qualification target, then e-skills Passport is the ideal tool to use to gain the new IT user qualification – the ITQ (see section 2 for details).

This guide will explain in detail how best to use e-skills Passport Office and allow you to get the most out of it for your organisation.

Note: e-skills Passport requires a minimum set of “Operate a Computer” skills such as the ability to use a mouse, access the internet, and enter data using a keyboard. e-skills Passport is not intended or suitable for individuals with no IT skills whatsoever, and those individuals may need help using the tool at first. Each user will also need a valid e-mail address.¹

¹ If users do not have an e-mail address they can set up a free web-based account that is accessible from any computer with internet access. For more information please ask your IT department or e-mail passportinfo@e-skills.com.

2. What is ITQ?

The framework at the heart of e-skills Passport has been used to create a new qualification: the ITQ. This qualification is fast becoming the de-facto standard for IT users in the UK and is increasingly being recognised by employers as a critical requirement for anyone using technology at work.

ITQ is different from other qualifications for three key reasons.

First, the qualification can be attained by knowing and/or learning skills at different levels according to those needed to do the job. For example, if database skills are not needed in your job then these skills need not be acquired but an individual can still get a full qualification. That means the ITQ qualification can be completely customised or “shaped” to suit the needs of individuals.

Secondly, the ITQ recognises and gives exemptions for most existing qualifications that may already have been obtained. For example, if an individual already has an ECDL module (BCS), CLAIT unit (OCR) or e-Equals unit (City & Guilds), these will exempt that individual from certain elements of the ITQ.

Finally, ITQ is unique in that you can import units from existing NVQs and use those to contribute towards the overall ITQ qualification. For example, if Health & Safety is important in a particular job, alongside technology skills, then you can import units from the Health and Safety NVQ which will contribute towards that individual’s ITQ.

3. Getting started with e-skills Passport Office

You can purchase e-skills Passport for your organisation by submitting the order form available from www.e-skillspassport.com/passportoffice or contacting us at passportsales@e-skills.com. e-skills Passports are priced at £10 plus VAT per user per annum and volume discounts are available. That cost includes full access to e-skills Passport Office administrator functions for customising e-skills Passports for your organisation.

Four Easy Steps To Get Started

1. Once your organisation has provided payment for e-skills Passports you will be sent a 12 digit access code by email.
2. Visit www.e-skillspassport.com/passportoffice and select *New users register here*.
3. Enter the access code (see image shown right) and complete the brief registration form which follows (please note all fields are mandatory).
4. You will need to agree with our Terms & Conditions before being able to access e-skills Passport and e-skills Passport Office.

Broker Sign in

When signing in, a broker must enter their user name and password and select which organisation they would like to manage first. Whilst in Passport Office they can switch organisations using the drop-down box in the top right-hand corner.

Forgotten Your Password?

Simply click on *Forgotten your password?* located under the sign in fields, enter your e-mail address and press *Go*. You will receive an email containing your user name and password to the address you registered with within a few minutes.

Forgotten Access Key?

If you have forgotten or lost your access key, and are therefore unable to sign in for the first time, please use the *Contact Us* section on the website to request further help.

4. Exploring and using the functions in e-skills Passport Office

Once you have registered you will see the e-skills Passport Office home page where you can view the six key function areas available to you. Click on *Configure Passport* to see further information on the functionality of each section.



e-skills Passport Office home page

4.1 Configure e-skills Passport

Administer Access Keys

Use this function to re-name access keys to more “usable” terms. For example, you may wish to change access key names to department titles such as Finance Department or Goods Inwards.

Amend Registration Fields

This function is used to set the mandatory registration fields required of your e-skills Passport holders at initial registration. We have set some mandatory registration fields, but you have the option to add more.

Personalise e-skills Passport

You can add your logo to the e-skills Passport site so all your users see that e-skills Passport is an initiative sponsored and managed by your organisation. Use the *Browse* button to select an image of your organisation’s logo from your computer’s hard drive in order to display it at the top right hand side of the page, just below the *e-skills Passport* logo (see below).



Framework Viewer

Framework Viewer lets you view and customise the employer-defined skills framework at the heart of e-skills Passport. Linked closely to the IT User National Occupation Standards, the framework is periodically reviewed by a group of employers to ensure the skills and techniques are up to date. There are 15 pre-populated techniques covering different aspects of IT use, all of which can be used as modules towards the ITQ qualification.

You also have the option of adding in additional techniques in order to build a master framework that suits your organisation. There are two types of additional techniques you can add: standard and Sector Specific Units (SSUs).

Standard techniques are for use with *Job Role Profiles* (see the Set Targets section for more information), whilst SSUs are for use with *ITQ Profiles*.

Standard techniques - for each level of standard techniques you can define the following information for display to your users (see image):

- summary;
- header and footer; and
- descriptors (competencies) that users will answer Yes/No to



Sector Specific Units - to make a standard technique an SSU simply tick the SSU box next to its title. Sector Specific Units are for use only when building ITQ Profiles and represent a module of learning from a qualification other than the ITQ that can count towards the attainment of a full ITQ. The unit you import in must be part of an existing NVQ qualification: please see section 5 of this document and the e-skills Passport Office for more information regarding SSUs. As Sector Specific Units only exist at one level, you can enter an active description of the unit, for display to your e-skills Passport holders, at one level only.

Note: The Manage Training section of this document explains how you can add your own in-house training and map it to the framework, including your additional techniques, for recommendation to your users when they have skills gaps in the relevant areas.

4.2 Manage Users

This is a key function within e-skills Passport Office as it is where you can set up or import e-skills Passport users and administrators. In this section there are the following five tabs:

- Create Administrator
- Create Passport
- Import Passport
- Search
- Manage Teams

Create Administrators

Administrators are not e-skills Passport holders themselves, but have access to e-skills Passport Office in order to manage it for your organisation. You can create as many administrators as necessary by entering the individual's email address, choosing whether to send them an email containing their sign in details and clicking *Create Record*.

To create multiple individuals on the system in one go you can create a CSV file (see section 5 for a definition of CSV files). Using CSV files to create individuals also allows you to assign many users to a team or profile in one go instead of doing each one individually. If you select *Send a welcome email with login details* tick box an automatic e-mail will be sent to the new user(s) within a few minutes containing details of how they can get started.

Once a user has been created their user name and password will be displayed to you on the screen. If you have not allowed the system to send out the welcome email it is important to make a note of these details as the password will not be displayed again. If you do need to retrieve lost passwords, ask your users to use the *Forgotten your password?* link available from the sign in page.

To assign an e-skills Passport to an administrator at a later date go to *Search*, find the individual and select *Assign Passport*. To access their e-skills Passport the individual should visit the user site (www.e-skillspassport.com) and log in using their existing user name and password.

To provide administrator access to an existing e-skills Passport holder go to *Search*, find the individual and select *Administrator* on their record before clicking *Save*.

Brokers (see section 3) have the ability to create an Administrator without an email address. This may be useful if the individual does not have email address or you are acting on their behalf. You must enter the number of Administrators you want to create and decide on a master password. Once created, the user name and password will be emailed to you and appear on the screen. The process is the same for creating users without email addresses.

Create Users

e-skills Passport users are created in this section. When you are creating a new e-skills Passport user you have the option of:

- selecting an access key from drop-down box (mandatory);
- assigning the individual to a team (optional);
- assigning the individual to a job profile (optional);
- making the individual a team manager (optional).

ITQ and Job Role Profiles can be added to individuals one by one after they have been set up in the system. However to save time, we recommend that you define your Job Role and ITQ profiles before creating users so that they can be assigned in bulk.

The screenshot shows a web form titled "Create individual". It contains the following elements:

- *Email address: A text input field.
- Or select a CSV file of email addresses to create multiple users: A file selection button labeled "Browse..." and a link "view example CSV file".
- *Access key: A dropdown menu with "Please select" as the current selection.
- Assign to team: A dropdown menu with "None" as the current selection.
- Create as team manager: A checkbox.
- Assign to profile: A dropdown menu with "None" as the current selection.
- Send a welcome email with login details: A checked checkbox.
- * denotes mandatory field: A note at the bottom left.
- Create record: A blue button at the bottom right.

Creating a new individual

Import Passports

You can import an existing e-skills Passport holder's record to your e-skills Passport Office, allowing you to view and manage them as with all e-skills Passport records you have created. To import an existing e-skills Passport record, enter the individual's e-skills Passport number and surname and click *Import*. Please note: you must have the individual's permission to do this.

The screenshot shows a web form titled "Import Passports". It contains the following elements:

- *Passport number: A text input field.
- *Last name: A text input field.
- *Usage: A dropdown menu with "Import only" as the current selection.
- Assign to team: A dropdown menu with "None" as the current selection.
- Create as team manager: A checkbox.
- Assign to profile: A dropdown menu with "None" as the current selection.
- Send a welcome email with login details: A checked checkbox.
- * denotes mandatory field: A note at the bottom left.
- Import Passport: A blue button at the bottom right.

Importing a Passport user

Search

This section allows you to search for individuals registered in your e-skills Passport Office. Once you have found the individual you are looking for you can view and edit their:

- **Registration details** – view and edit individuals' registration details such as user name, password and email address.
- **Profile** – assign or change individuals' profiles so they assess themselves against different skills areas or levels.
- **Skills progression report** – view how the individual is becoming more competent in skill areas selected in their profile (this relies on the user updating their assessment when they learn new skills).
- **Activity log** – how the individual has been using the system in the last month.

Note: as a manager, you may only search for users within your team.

Manage Teams

Manage Teams allows you to create, edit and delete teams and their managers. When creating teams it may be useful to think about their two main uses:

1. team managers are responsible for approving the profiles of other individuals in their team; and
2. you can run reports on a per team level as well as across the whole organisation.

Individuals can belong to many teams, and there can be as many managers in each team as you require.

To create a new team, enter its name in the free text box and click *Create Team*. You can add individuals to the team by selecting *Edit*, searching for individuals, selecting those you want to include, and clicking *Add to team*.

Should there be more than one manager in a team, approval of profiles operates on a first come, first served basis (*see the Approve Profiles section for more info*).

4.3 Set Targets

In order to ascertain skills gaps across your organisation you must set and assign skills profiles. *Set Targets* lets you create and edit ITQ and Job Role Profiles from the skills defined in the *Framework Viewer*.

To find out more about ITQ please visit <http://itq.e-skills.com>.

Manage ITQ Profiles

To set up an ITQ Profile you have two choices:

1. Build an ITQ profile from scratch - select *New (Blank) ITQ Profile* under Add new profile, type in the profile name and click *Add* (see below). After adding the new profile, click *Manage profile* before selecting the level of ITQ you are defining. Once this is done, you will be presented with the ITQ calculator, designed to help you select units that meet the requirements of the qualification (ITQ is based on a points system and clicking on *Calculate* will inform you whether the profile you are building has enough points to add up to a qualification).
2. Use an example ITQ profile as a starting point when defining your own target profiles. To do this: choose an ITQ profile from the drop down box, type in the profile name and click *Add* (see below). When you have added the profile, you can edit it to suit your needs by clicking *Manage profiles*.

Create & manage ITQ profiles			
ITQ level 1	ITQ Level 1	Active	Modify Manage profile
ITQ level 2		Inactive	Modify Manage profile

Add new profile

New (Blank) ITQ Profile

Profile name

Add

Creating an ITQ profile

Note: These example profiles have been defined by e-skills UK in conjunction with employers.

Manage Job Role Profiles

Setting up a Job Role Profile follows a similar process but does not involve the ITQ calculator. You simply select the target level for each technique you would like to assess your users on.

As with ITQ profiles (see above) there is a list of example job profiles, which can be selected if they match job roles in your organisation. These can be tailored to your organisation's needs or saved as they are.

Users will only be presented with techniques to self assess against that are in the profile assigned to them. Don't forget to save each ITQ/Job Role Profile once you have finished creating and editing.

Note: By default, users are able to compare their skills against the example ITQ/Job Role Profiles in their e-skills Passport. This does not permanently override any target profile you have set for them, and when users sign out their target profile will be reset to its previous state. However, if you wish to turn this feature off, go to *Set Targets* and un-tick *Activate Example Profiles*.

4.4 Manage Training

Any custom or in-house training run by your organisation can be added into e-skills Passport and mapped against the framework defined in the *Framework viewer*. This training will then be recommended to users who have skills gaps in the relevant places, instead of the qualifications that can count towards an ITQ that are pre-populated in the system.

Add training

First create categories to store your training courses under using the form shown below. Simply enter the name of the categories in the free text box and click *Add*.

Training Category	Active
training	Yes

training

Add

Once this has been done, select the category title from the list on the left hand side of the screen and add in the individual training courses (below). Make sure you mark categories and training as *Active* so that they are recommended to your users. To hide a category or training course from users mark it as in-active.

Course	Active
Bob's Lunchtime Spreadsheet Session	Yes

Bob's Lunchtime Spreadsheet Session

Add new

Map training

Select the area of the framework a particular piece of training corresponds to using the tree structure on the left of the screen and then click *Map new* in order to select the course you have just entered. You also have the option of selecting whether a particular piece of training completely or partially covers the requirements of the technique at any particular level.

4.5 Approve Profiles

Overview

This page shows the status of Passport holder's self-assessments. If you are assigned as a team manager, you will be shown a list of the teams for which you are a manager and the number of employees from each team whose self-assessments are in progress; ready for approval; or approved. If you are an administrator, you can also choose to view the progress of all team members across your company.

In progress

Allows you to monitor the progress of users as they complete their self-assessments. You can see a user's entire profile, including the individual Yes/No answers they gave at self-assessment.

Ready for approval

All users who have submitted their self-assessment for manager approval are displayed in the *Ready for approval* section. You are able to look at each user's profile in turn and see which skills they believe they do and do not have. The manager can then record two sets of notes on the profile: one for their own future reference, viewable only to themselves, and the other to send to the individual.



Team	In progress	Ready for approval	Approved
Planning, Environ, Transport (PET)	1	0	12
Health, Social, Sports (HSS)	4	0	66
Admin & Clerical (A&C)	1	0	13

Manager approval is for the entire profile. If you do not agree with a user's self assessment on any particular technique you must choose not to approve the entire profile and state which techniques need re-visiting in your comments to the individual. Once a manager has decided whether or not to approve the profile, an e-mail is sent to the individual notifying them of the decision and showing them the manager's comments.

Approved

Displays profiles that have already been approved. You can also see your manager notes and the comments sent to the individual.

4.6 Reports

This is where the real power of e-skills Passport demonstrates itself. Data from self-assessments is used to generate reports for:

- the whole organisation;
- certain teams;
- approved or unapproved profiles; and/or
- specific ITQ or Job Role Profiles.

This allows you to either gain a company wide snapshot of skills, or drill down and view data for specific groups of people.



Four standard reports are available to view and download.

Skills Capabilities

Shows the skills capabilities within your organisation. Based on the self assessments your employees completed it will show how many individuals possess a certain skill and what level within that skill they are capable of. You can also pinpoint exactly which individuals are at each level for each technique.

Skills Progression

Shows average skills progression per technique across your organisation or for specific groups over time. For this type of report to work effectively it is important to encourage your users to revisit and update their e-skills Passport regularly.

Skills Gap Analysis

This report will show the average skills gaps per ITQ or Job Role Profile between users' current assessed skill levels and the target levels that have been assigned for them.

Skills Gap Ranking

Shows the skills gaps that are most prominent in your organisation in order that you can assign your training most effectively.

5. Some useful definitions

Administrators

Administrators configure your organisation's e-skills Passports and the framework they are based on; create users and set permissions; set and assign ITQ and/or Job Role Profiles; define teams; assign managers, and produce reports. Any number of e-skills Passport holders can be assigned as administrators with access to e-skills Passport Office and its functions.

Managers

Each team defined by administrators may have one or many managers, depending on your organisations use of the system. Managers have the ability to view and approve their team's self assessments and progress, and report on their team using the four pre-defined reports. They can also search for users in their team in *Manage Users* where they can view the user's personal details, profile, skills progression report and activity log.

e-skills Passport holders

e-skills Passport holders are the end users and have the ability to identify and record existing skills and qualifications; submit self assessments for approval; identify skills gaps, and plan a learning journey on route to better skills and/or the ITQ qualification. Please see the *e-skills Passport - Guide for Users* for further information.

Broker

A broker is an administrator (see definition above) who oversees e-skills Passport Office on behalf of multiple organisations. Set up by e-skills UK, a broker has one user name and password to access all organisations assigned to them. If you want to find out more about becoming a broker, please use the *Contact us* form on the e-skills Passport website.

Sector Specific Units (SSU)

A Sector Specific Unit (SSU) is a unit from a qualification other than the ITQ that can be imported and count as a unit of learning towards a full ITQ qualification. They can be added into the e-skills Passport Office *Framework Viewer*, using the links provided on the site to the OpenQUALS database (www.openquals.org.uk), as reference. For more information about building an ITQ customized for your learners please visit the ITQ website at www.e-skills.com/itq.

CSV (Comma Separated Value) files

CSV files are a universal method of recording and transferring data. Entries are separated by commas which can be followed by a space and/or tab characters, although these are ignored by the software reading it. You can create a CSV file using common text editing or spreadsheet software: please ask your internal IT support for help.

NB: files with extensions .csv and .txt will be accepted by e-skills Passport Office for the *Create Individual* bulk upload feature.

6. Useful links

For a comprehensive list of training providers delivering ITQ, publications and leaflets and general information please visit: www.e-skills.com/itq.

7. Essential contact information

For further information about e-skills Passport:

- visit www.e-skillspassport.com or www.e-skillspassport.com/passportoffice;
- email passportinfo@e-skills.com; or
- write to e-skills UK at 1 Castle Lane, London SW1E 6DR.