

Quick reference guides

September 2011

Quick reference guides

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1 SecureAssess basics	Understand the basic aspects of system navigation, like how to log in and log out, general screen layout, how to search and how to customise tables to display the data you wish to view. Use the Personal Profile Management screen to change your personal details and your password.
2 Print Invigilation Pack	Understand how to print an Invigilation Pack.
3 Invigilation screen	Understand all the functions available to the invigilator during an exam, including how to unlock an exam, pause it, resume it and void it.
4 Exams – What the candidate sees	Understand the SecureClient Candidate Interface: in other words, the screens that the candidate sees when taking an e-volve exam. You will need to be familiar with this guide in order to be able to assist candidates if they have any questions regarding the use of the system.
5 Results	View results in SecureAssess Central. Generate and print score reports.
6 Offline examining	Download exams to a laptop, deliver them offline and upload the candidate's answers back to the Central Server.
7 SecureAssess Local (mobile network)	This guide is only applicable to centres that use SecureAssess Local.

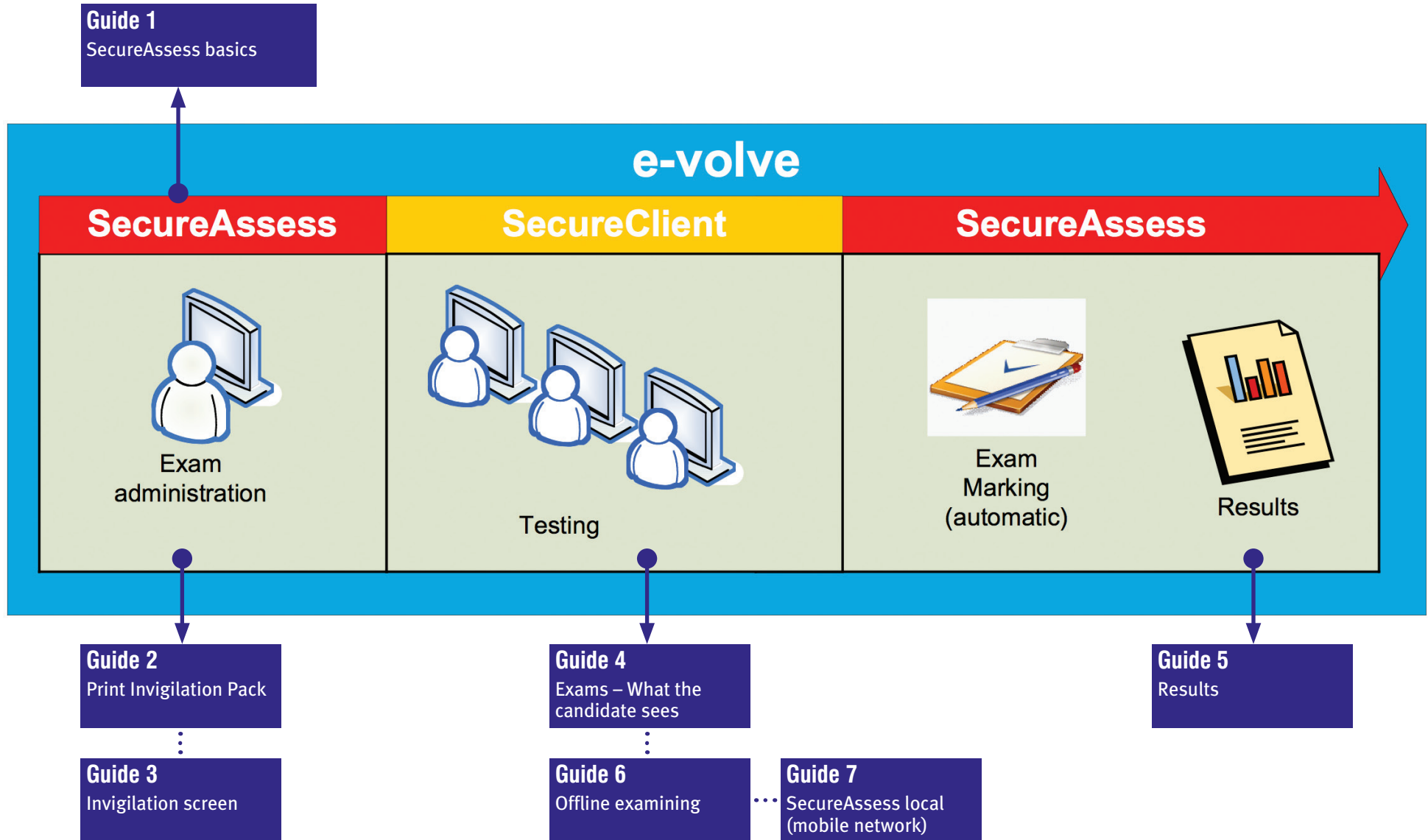
Require further assistance?

Contact the City & Guilds dedicated e-volve migration team on:

Tel: **020 7294 2898**

Email: e-volve.migration@cityandguilds.com

Quick reference guides



Quick reference guide 1: SecureAssess basics

Log in

1. Follow URL: <https://evolve.cityandguilds.com>
2. Enter username and password



Please Log In

SecureAssess®

User Name:

Password:

Log In

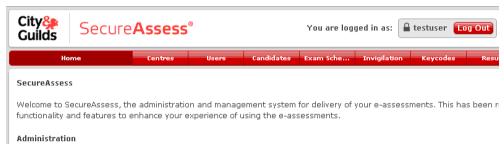
Surpass®

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Server: <https://evolve.cityandguilds.com>

Login details will be emailed to you
Password is case-sensitive
Password does not expire
Change Password to something memorable when you first log in

3. You will land on the Homepage



City & Guilds **SecureAssess®** You are logged in as: testuser **Log Out**

Home Centre Users Candidates Exam Schedules Invigilation Keycodes Results

SecureAssess

Welcome to SecureAssess, the administration and management system for delivery of your e-assessments. This has been re-functionalised and features to enhance your experience of using the e-assessments.

Administration

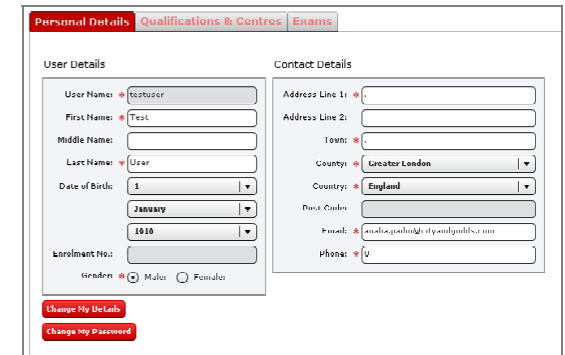
Log out



City & Guilds **SecureAssess®** You are logged in as: testuser **Log Out**

Change your details or password

1. Go to **Personal Profile Management** tab
2. Amend details as appropriate and click **Change My Details** or
3. Click **Change My Password** enter your old and new password.



Personal Details | Qualifications & Centres | Exams

User Details

User Name: testuser

First Name: Test

Middle Name:

Last Name: User

Date of Birth: 1 January 1910

Enrolment No.:

Gender: Male Female

Contact Details

Address Line 1:

Address Line 2:

Town:

Country: Greater London

England

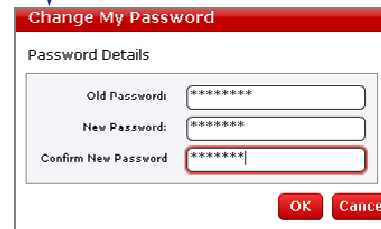
Post Code:

Email: evolve@cityandguilds.com

Phone:

Change My Details

Change My Password



Change My Password

Password Details

Old Password: *****

New Password: *****

Confirm New Password: *****

OK **Cancel**

Password must be at least 6 characters long and it is case-sensitive
It could be letters and/or numbers

Important

- The CII Customer Service Team can retrieve your **forgotten user name** and reset your **forgotten password**.

Quick reference guide 1: SecureAssess basics

General screen layout

Menu tabs. Access different system areas. The number of tabs available depends on your role

Basic and advanced search options to filter the data shown on the screen

Table containing the information you are interested in. For example, lists of exams or results

Buttons to create or edit entries in the table. Selecting a button will often launch a dialog box

Qualification	Exam Name	First Name	Last Name	Exam Date	Result	Percentage	Centre	Exam Date	Duration
2330 Demo	2330-202 Prin...	Seyhan	Baki			0		45	
2330 Demo	2330-202 Prin...	Tim	Burnett			0		45	
2330 Demo	2330-202 Prin...	Gareth	Hopkins			0		45	
2330-01	2330-201	Maryam	Abdulrahman	RKN3961	Fail	10%	Barking & Dage...	05/10/2010	45
2330-01	2330-201	Jubair							
2330-01	2330-201	Kathy							
2330-01	2330-201	Kathy							
2330-01	2330-201	Afina	Afzal	RKO9678	Fail	17%	1234562 City ...	11/10/2010	52
2330-01	2330-201	Peter	Ailwood	RKP0316	Pass	63%	1234562 City ...	19/10/2010	45
2330-01	2330-201	Jamil	AkhtarCC	RPO6359	Fail	10%	LEWISHAM CO...	18/10/2010	52
2330-01	2330-201	Claire	AlgarCC	RPN8261	Fail	17%	1234562 City ...	18/10/2010	52
2330-01	2330-201	Maria	Allewa	RKN4444	Credit	73%	1234562 City ...	14/10/2010	47
2330-01	2330-201					0%	1234562 City ...	13/10/2010	45
2330-01	2330-201					23%	LEWISHAM CO...	18/10/2010	52
2330-01	2330-201					13%	LEWISHAM CO...	18/10/2010	52
2330-01	2330-201					13%	CARSHALTON ...	18/10/2010	52
2330-01	2330-201					7%	Barking & Dage...	05/10/2010	45
2330-01	2330-201	JAMES	ANDERSON	RLN3158	Fail	0%	1234562 City ...	13/10/2010	45
2330-01	2330-201	Jill	Anikeeva	RKN4615	Fail	3%	1234562 City ...	13/10/2010	45
2330-01	2330-201	Claire	Anna	RKN4542	Fail	0%	1234562 City ...	13/10/2010	45
2330-01	2330-201	Claire	Anna	RKN4542	Fail	20%	1234562 City ...	14/10/2010	50
2330-01	2330-201	Mariam	Annett	RKN3924	Fail	7%	Barking & Dage...	05/10/2010	45
2330-01	2330-201	Mariam	Annett	RKN3924	Fail	47%	1234562 City ...	14/10/2010	45
2330-01	2330-201	Charles	Anokhina	RKN4627	Fail	17%	1234562 City ...	13/10/2010	45

Advanced search functions

A range of search tools are available when you click **Advanced**

Last Name

Contains Exact match

Result

Fail

Close

Pass

Voided

From: 28/08/2010

to: 27/10/2010

August 2010

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Exam Time Range

00.00 - 23.59

Table customisation

Sort by clicking on heading

Alter the order in which columns appear by dragging and dropping from column heading

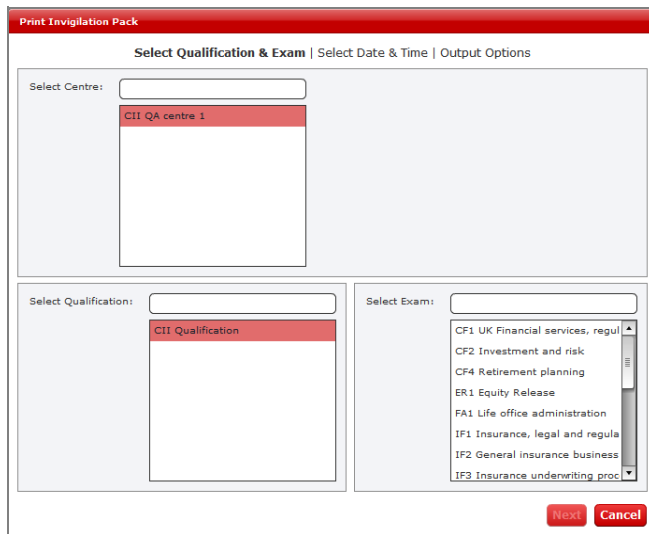
Resize

Important

- Navigate using the buttons within the SecureAssess interface, not the buttons of the web browser.
- To view whole screen properly, screen resolution should be at least 1024 x 768. You may need to switch your browser to 'Full Screen' mode.

Quick reference guide 2: Print invigilation pack

1. Click on **Print Invigilation Pack** on the **Invigilation Screen**.
2. Select the Centre Installation ID where the exam takes place, qualification and unit being tested.

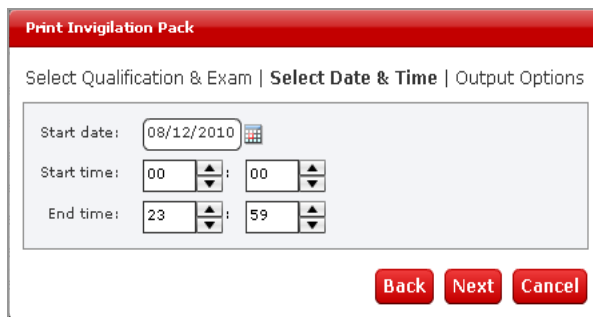


The screenshot shows the 'Print Invigilation Pack' window with the following sections:

- Select Centre:** A dropdown menu with 'CII QA centre 1' selected.
- Select Qualification:** A dropdown menu with 'CII Qualification' selected.
- Select Exam:** A list of exam units including CF1 UK Financial services, regul, CF2 Investment and risk, CF4 Retirement planning, ER1 Equity Release, FA1 Life office administration, IF1 Insurance, legal and regula, IF2 General insurance business, and IF3 Insurance underwriting proc.

Buttons for 'Next' and 'Cancel' are visible at the bottom right.

3. Select the time and date when the exam takes place.

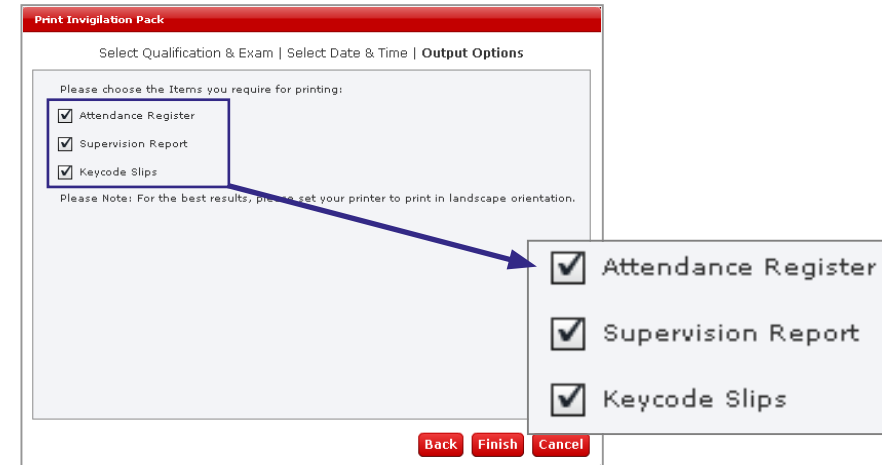


The screenshot shows the 'Print Invigilation Pack' window with the following sections:

- Select Date & Time:** A date picker set to '08/12/2010' and a time picker set to '00:00' to '23:59'.

Buttons for 'Back', 'Next', and 'Cancel' are visible at the bottom.

4. Select the elements you wish to print.



The screenshot shows the 'Print Invigilation Pack' window with the 'Output Options' section. A blue box highlights the 'Please choose the Items you require for printing:' area, and a blue arrow points to a zoomed-in view of the checkboxes:

- Attendance Register
- Supervision Report
- Keycode Slips

Buttons for 'Back', 'Finish', and 'Cancel' are visible at the bottom.

Attendance Register	Supervision Report	Keycode Slip
It is a requirement that you use this form to indicate that candidates were present and verify that all candidates completed the exam under the proper conditions.	For CII exams use the CII Incident Report Form to confirm that the exam was carried out according to exam body regulations. Report and detail any disturbances that occurred during exam.	This is not required for CII exams. Contains exam information and individual candidate details, including their unique exam keycode. Provide each candidate a slip for reference purposes.

5. Click **Finish** and choose a printer.

Important

- You need to set your printer to landscape
- With Adobe PDF Writer (or a similar product) installed, you can save an electronic copy by selecting Adobe PDF (or equivalent) in the printer name dropdown.

Quick reference guide 3: Invigilation screen

City & Guilds SecureAssess® **Invigilation Tab** You are logged in as: centre_user3 **Log Out** Powered by Surpass®

Home Users **Invigilation** Results Personal Profile Management

Search **Submit** Show today's exams only **Advanced**

Key: Locked Locked For Invigilator Locked By PIN Ready In Progress Paused Finished Voided Ready for Download Downloaded

User Disconnected (1)

State	PIN	Keycode	Centre Name	Qualification	Exam Name	Candidate	Enrolment N	Exam Date	Exam Time	Duration	Invigilat
		9DBVCGB2	818183 (02BGHK) Giltspur Street - ...	3638 Key Skills	3638-975 Co...	Dan Smith	SVW0518	14/03/2011	13:00:00	60	true
		RJ87ZVB2	818182 (01BGHJ) Room 1 - Exampl...	3638 Key Skills	3638-975 Co...	Louis Griffin	SVW0315	13/04/2011	14:00:00	60	true
		QJ66TZB2	818183 (01BGHK) Main Cam...	Exam and candidate details				08		60	true
		UJM8TAB2	818183 (01BGHK) Main Campus - ...	2330 Electrote...	2330-201 Wo...	Jon Marino		08		60	true
		C4GYVYB2	818183 (02BGHK) Giltspur Street - ...	3638 Key Skills	3638-975 Co...	Ben Jackson	SVW0885	06/04/2011	14:30:00	60	true
	0000	PWKJ7YB2	818183 (02BGHK) Giltspur Street - ...	3748 Function...	3748-114 Wri...	Jhon Rider	SVW1868	29/03/2011	15:00:00	60	true
		DAAM3SB2	818183 (02BGHK) Giltspur Street - ...	3748 Function...	3748-114 Wri...	John Rider	SVW1992	29/03/2011	15:30:00	60	true
		9JJ7AXB2	818182 (01BGHJ) Room 1 - Exampl...	3638 Key Skills	3638-975 Co...	Susan Boyle	SVV9615	29/03/2011	12:00:00	60	true

Exam date and time

Exam duration, including any additional time

Keycode: Uniquely identifies the candidate and the exam they are to take. Necessary to unlock the test

PIN number (See 2.a overleaf)

Symbols indicating exam state (See 1 overleaf)

Page 1 (1-8 of 8)

Modify Duration Set PIN Remove PIN Unlock Pause Resume Void Print Invigilation Pack Select All in Page Refresh

Modify Duration For CII use only, once evidence e.g. medicate certificate received and accepted. All queries to be referred to CII Online Exams Team.

Set PIN Set and remove optional PIN number to unlock exams.

Remove PIN (See 2a overleaf)

Unlock Click to **Unlock** exams without a PIN number. (See 2b overleaf)

Pause/Resume **Pause/Resume** an exam (e.g. in the event of a fire drill).

Void Click to **Void** an exam. For use **only** where a candidate is absent. (See 3 overleaf.)

Print Invigilation Pack Click to **Print an Invigilation Pack** including: Attendance Register, Supervision Report and Keycode Slips. (See separate guide for details.)

Select All in Page Select all exams in the page to set PIN, unlock, pause, resume or void them all at the same time.

Refresh The information on this screen is live, and is constantly being updated as the exams progress. You can also refresh manually at any time by clicking **Refresh**.

Important
Columns may appear in a different order. You can alter the order at any time by dragging and dropping the columns.

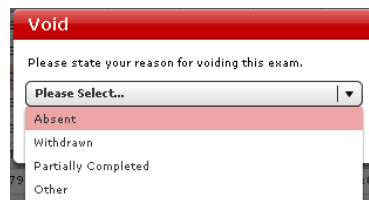
Quick reference guide 3: Invigilation screen

1. Symbols indicating exam state

Locked	Exam cannot be started yet (exam content is being prepared). Lasts only 24 hours.
Ready	Exam ready to be taken by the candidate.
Locked For Invigilator	Candidate has entered keycode and is waiting for the invigilator to unlock exam.
Locked By PIN	Candidate has entered keycode and now needs to enter PIN.
In Progress	Exam currently being taken by the candidate.
Paused	The exam has been paused by the invigilator.
User Disconnected	The candidate lost connection to the internet. Hover over icon for more details.
Finished	The candidate has finished taking the exam.
Voided	The exam has been voided by the invigilator, or 'auto-voided'
Ready for Download	Only for SecureAssess Local users – The exam is ready to be downloaded to the local server.
Downloaded	Only for SecureAssess Local users – The exam has been downloaded to the local server.

3. Voiding an exam

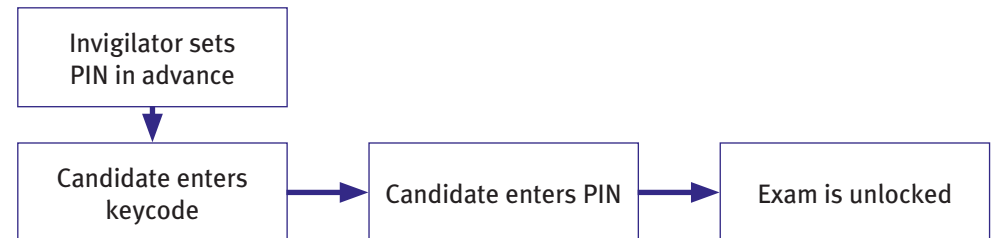
1. Click
2. Select a reason. You will be prompted to enter a reason if you select 'Other'.
3. Click again to finish



Important note: The **Void** button should only be used where a candidate is **absent**. Where a candidate has started an exam this should always be marked regardless of whether they fully complete it.

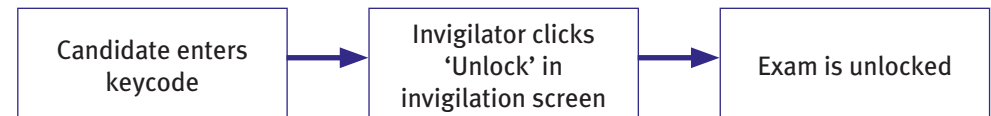
2. Unlocking an exam

2a: With PIN number



Ready	Locked By PIN	In Progress
Step 1	Step 2	Step 3

2b: Without PIN number

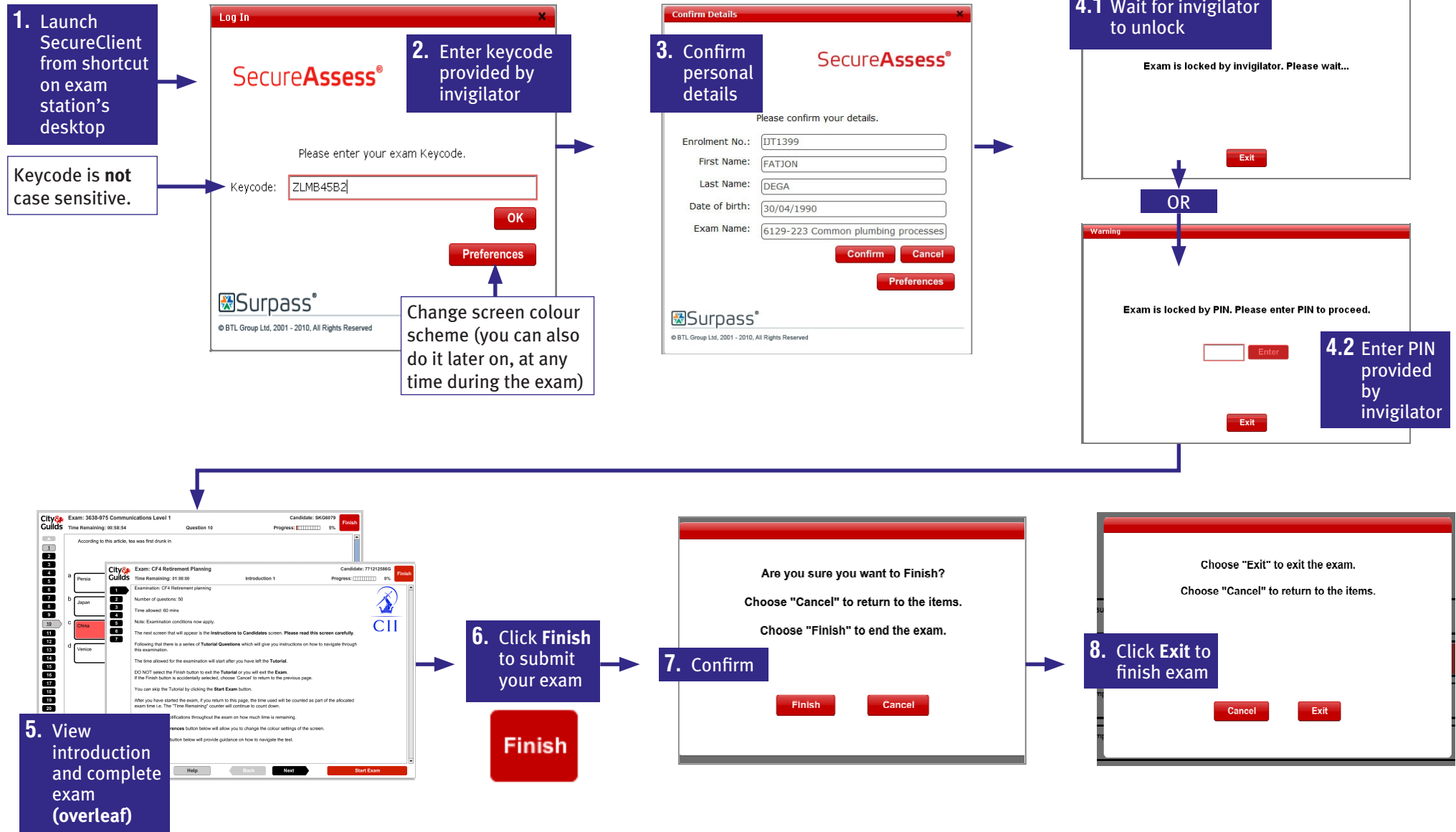


Ready	Locked For Invigilator	In Progress
Step 1	Step 2	Step 3

Important

All exams will be available on the invigilation screen in a 'Ready' state during the exam window: This is from **8 days** before until **30 days** after the scheduled exam date. These limits may vary by up to 24 hrs for international centres, depending on their time zone.

Quick reference guide 4: Exams – What the candidate sees



Quick reference guide 4: Exams – What the candidate sees

The screenshot shows the exam interface for 'Exam: 3638-975 Communications Level 1'. The candidate is SKG6079, and the progress is 25%. The current question is 'Question 2'. The document text is 'The document is' followed by four options (a, b, c, d) in text boxes. Option 'a' is highlighted in red. Below the options is an image of a poster for 'STOMP' at Sheffield Lyceum. The interface includes a question list on the left, a timer, a progress bar, and a 'Finish' button. At the bottom, there are buttons for 'Preferences', 'Help', 'Introduction', 'Back', 'Flag', and 'Next'.

Annotations:

- Flagged question:** Points to question 2 in the list, which has a red flag icon.
- Go to a specific question:** Points to question 7 in the list.
- Scroll down to view more questions:** Points to the scroll arrow at the bottom of the question list.
- Timer:** Points to the 'Time Remaining: 00:58:17' display.
- Progress bar:** Points to the 'Progress: 25%' indicator.
- Click when you finish exam:** Points to the red 'Finish' button.
- Change screen colour scheme to suit your particular needs:** Points to the 'Preferences' button.
- Access a tutorial anytime during the exam:** Points to the 'Help' button.
- Go back to Introduction screens:** Points to the 'Introduction' button.
- Flag this question to come back to it later:** Points to the 'Flag' button.

Important
The clock will continue to run while the preferences, help or introductory screens are accessed during the exam. To maximise your exam time, review these screens before starting the exam.

Quick reference guide 5: Results

City & Guilds SecureAssess® You are logged in as: **adelet** [Log Out](#) Powered by **Surpass®**

Home Centres Users Invigilation **Results** SA Local Admin Personal Profile Ma...

Search [Submit](#) [Advanced](#)

Qualification	Exam Name	First Name	Last Name	Enrolment No	Grade	Percent	Centre Name	Completed	Duration
3748 Function...	3748-114 Wri...	Sanity	Check	SPJ7407	Pass	100%	73AAAA online	11/03/2011	66
3748 Function...	3748-114 Wri...	Sanity	Check	SPJ7407	Pass	40%	73AAAA online	11/03/2011	66
9898 NAVTest	9898-998 NA...	Pier...	Lynch		Pass	0%	AA0000 Test ...	11/03/2011	60
3638 Key Skills	3638-975 Co...	San...			Fail	3%	73AAAA online	11/03/2011	60
6129 Plumbin...	6129-212 Ba...	Sanity					73AAAA online	11/03/2011	75
9898 NAVTest	9898-998 NA...	Sanity					73AAAA online	11/03/2011	60
3638 Key Skills	3638-975 Co...	Candidate					BTL Test Centre	10/03/2011	60
BTLTestQual	BTLTest1Exam	Candidate	Candidate	123456	Pass	0%	BTL Test Centre	09/03/2011	60

Page 1 (1-8 of 8)

[Candidate Report](#) [Summary](#) [Candidate Breakdown](#) [Exam Breakdown](#) [Results Slip](#) [Print](#) [Refresh](#)

Exam details

Candidate details

Result and % mark achieved (based on total number of items in the exam).

Centre installation where the exam took place

Date completed

Standard time allocated for the exam plus any additional minutes allocated to the candidate

For CII exams only use Results Slip, Print and Refresh options

Report buttons

Candidate Report	Do not use – Not applicable to CII
Summary	
Candidate Breakdown	
Exam Breakdown	
Results Slip	Results slip only. Can be run for multiple candidates. One sheet per candidate.

Additional buttons

Print	Click to obtain a printout of the Results table as you see it on the screen.
Refresh	Click to refresh the data on the screen with new results coming through and search filters applied.

Important

- Results only take a few minutes to appear on this screen after the test.

Quick reference guide 5: Results

Score report sections

You can print a Results slip from the results screen.

Qualification	Exam Name	First Name	Last Name	Enrolment No.	Grade	Percent	Centre Name	Completed	Duration
CII	ER1 Practical release - Inspection	Thomas		77100078099	Fail	0%	CII QA centre1	31/08/2011	100
CII	CF2 Internal services - Inspection	Thomas		180004402	Fail	0%	CII QA centre1	31/08/2011	60
CII	CF2 Investment and - Inspection	Thomas		180004402	Fail	0%	CII QA centre1	31/08/2011	60
CII	CF2 Investment and - Inspection	Thomas		180004401	Fail	0%	CII QA centre1	31/08/2011	60
CII	ER1 Equity release - Pract	Thomas		99991111	Fail	0%	CII QA centre2	09/08/2011	60
CII	ER1 Equity release - Pract	Thomas		99991112	Pass	100%	CII QA centre2	09/08/2011	60
CII	ER1 Internal Test - Pract	Thomas		99991113	Fail	0%	CII QA centre2	09/08/2011	60
CII	ER1 Practical Practice - Pract	Thomas		99991112	Pass	14.7%	CII QA centre2	09/08/2011	100

Results screen

Onscreen Exam Result Report

PRIVATE AND CONFIDENTIAL

CIIQA1
CII QA centre1
123124
town
Bedfordshire
England

Candidate Name: First Test
Enrolment No.: 99991111
Centre Name: CII QA centre1
Centre Code: CIIQA1
Qualification Name: CII
Exam Name: ER1 Equity release
Test Date: 09/08/2011
Result: Fail

This is not a certificate.
All marks and results shown are subject to moderation by the awarding organisation.

Print Cancel

Results slip
Provisional results slip for the candidate, indicating candidate/test details and overall result.

Print report

Candidate selection

There are two ways of selecting the candidate(s) for whom you wish to generate a report.

Method 1 – Manual selection (recommended):

1. Select candidates from the results screen (hold Ctrl+ key for multiple candidates).
2. Press the **Results Slip** button
3. When prompted, click **Create report using selected Candidates**

Method 2 – Reporting Wizard

1. Press the **Results Slip** button
2. When prompted, click **Create report using reporting wizard**
3. Follow the wizard's instructions to select centre, exam and candidates. Click next to generate the report.

Important

- Printer page layout must be set to landscape.
- With Adobe PDF Writer installed, you can save an electronic copy by selecting Adobe PDF in the Printer Name dropdown.

Quick reference guide 6: Offline examining

1. Launch SecureClient. Make sure you have an internet connection.



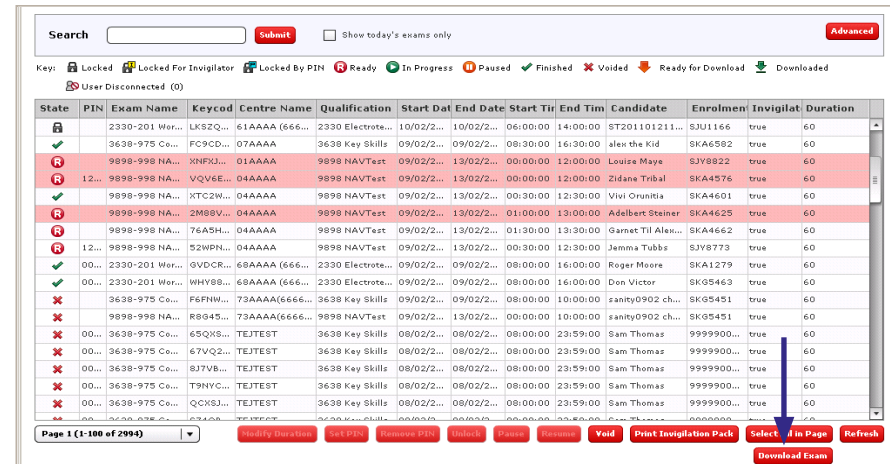
2. Click **Show Admin** button. This will open the **SecureClient Admin Console**.

3. Login with your SecureAssess username and password.

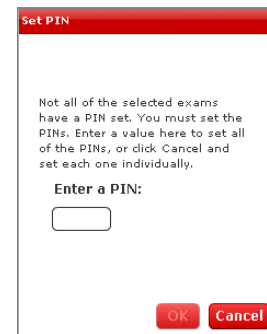


4. Click the **Download Exams** button at the bottom of the screen. This will open the SecureAssess invigilation screen.

5. Select the exams you wish to download and click the **Download Exam** button.



6. If you have not set a PIN for the exams to be downloaded, you will be prompted to do it now. You can enter a PIN for all the selected exams at the same time, or you can cancel and set the PINs from the Invigilate screen.



7. A pop-up will indicate when the download of the exams begins. Click 'Close' to download more exams. Click 'Close Download Window' to go back to the SecureClient dashboard.



Quick reference guide 6: Offline examining

8. The SecureClient Admin Console will show the status for each exam (downloading or ready). Ready exams can be taken offline by the candidate.

State	Cache	PIN	Exam Nam	Keycode	Centre Nai	Qualificati	Start Date	End Date	Start Time	End Time	Candidate	Enrolment	Duration
R	A	1234	3638-975 ...	fb9yhn2	01AAAA	3638 Key S...	17/03/2011	17/03/2011	00:00	23:59	Jonathan Be...	SKG6079	60
✓	A	1234	3638-975 ...	wb6zjb2	01AAAA	3638 Key S...	17/03/2011	17/03/2011	00:00	23:59	Joe Bloggs	SKG6079	60
✓	A	1234	2330-201 ...	cv5cy7b2	01AAAA	2330 Electr...	17/03/2011	17/03/2011	00:00	23:59	John Barnes	SJY9232	60
R	A	1234	2330-201 ...	86dpmkb2	01AAAA	2330 Electr...	17/03/2011	17/03/2011	00:00	23:59	James Arm...	SHN9157	60

9. To delete any downloaded exams, select them in the table and click at the bottom of the screen.



10. When you finish, log out of the SecureClient Admin Console by clicking



at the top of the screen.

2. Sitting exams offline

- Same process as online
- After the test, the Invigilator logs into the SecureClient Admin Console and views results by selecting an exam and clicking

3. Uploading completed exams

1. Log back into SecureClient Admin

2. Select completed exam and click

State	Cache	PIN	Exam Nam	Keycode	Centre Nai	Qualificati
✓	A	1234	2330-201 ...	9qtmrb2	02AAAA	2330 Electr...

3. A pop-up will display showing successfully/unsuccesfully uploaded exams.

Exam Name	Keycode	Qualification	Candidate
2330-201 Working Effectively a...	9qtmrb2	2330 Electrotechnical	user1 user1

4. Successfully uploaded exams will disappear from SecureClient and they will appear in the Results screen in SecureAssess Central.

Important

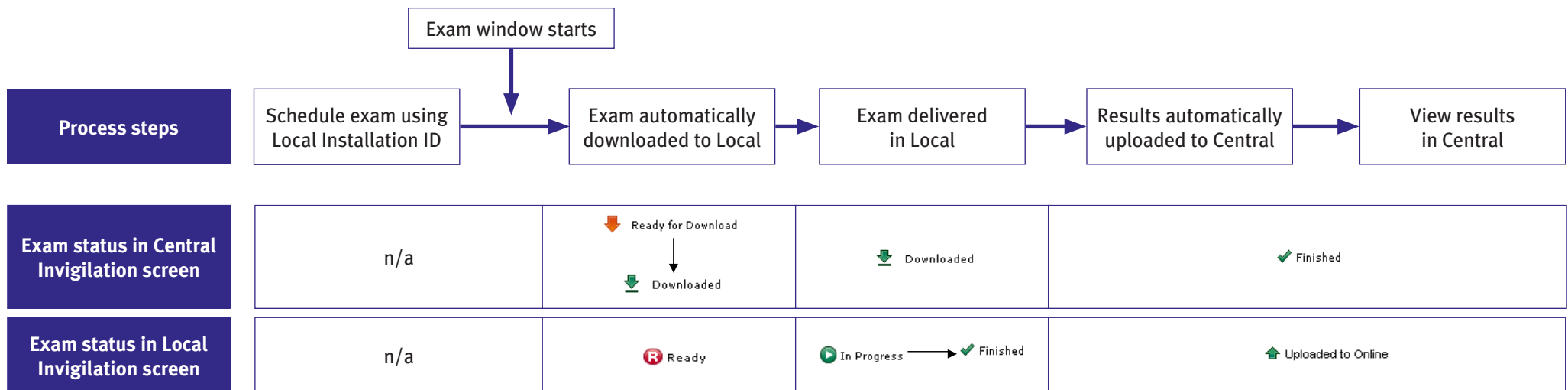
Completed exams must be uploaded before the end of the exam window (30 days after the scheduled exam date). Failure to do so will cause complications and there is a danger that we may not be able to recover your exam results.

Quick reference guide 7: SecureAssess local (mobile network)

This guide is only applicable to centres that use SecureAssess Local

- Access SecureAssess Local with a url specific to your Centre (provided by your IT department).
- Username and password are the same as those for SecureAssess Central.
- The only function that you will carry out in SecureAssess Local is invigilation. Everything else is done in SecureAssess Central.
- The invigilation process in SecureAssess Local is exactly the same as the one in SecureAssess Central. The only difference is that when an exam is finished, it will automatically upload to SecureAssess Central (if an internet connection is available). The status icon will turn from uploaded to online.
- Results are not available in SecureAssess Local. Once the exam status turns from uploaded to online, you can log out of SecureAssess Local and log back in to SecureAssess Central, and go to the Results tab as usual to view the score reports.

The following diagram summarises the process of delivering exams in SecureAssess Local.



Important

Score reports are not available immediately after the test in SecureAssess Local. To obtain a score report, the server laptop needs to connect to the internet and upload the completed exam to the central server.