ILM Assessment Portal

Customer Guide

This is a reference guide for the ILM Assessment Portal ("Portal"), ILM's online tool for Centre customers who use the ILM Assessment Service. The guide is designed to supplement our pre-recorded webinar training material, and provides step-by-step examples for using each section of the portal so you can dip in and out as needed.

Contents

Getting started 2
How to filter, sort and browse 3
Unit Assessment 5
Integrated Assessment 7
Pending Submission 9
Tracker 11
Troubleshooting 14

Getting started

As an ILM Assessment customer, you will be able to use the Portal to maintain a bird's-eye-view of the work you have submitted to us for marking.

The Portal allows you to:

- View candidate learners whom you have already registered on our 'Walled Garden' system against ILM Assessment qualifications
- Upload and submit files securely on behalf of relevant learner(s) for marking
- Track progress of work submitted, including final results and feedback from ILM
- Sort and filter data, which will be held on the Portal for up to three years
- Export data to Excel, so you can save time on internal management reporting

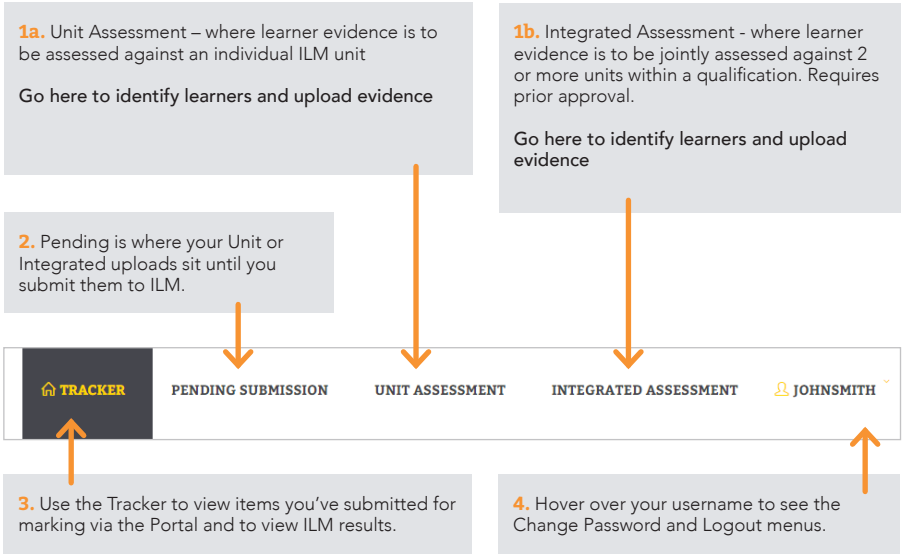
Log in

Go to **www.ilmassessment.co.uk**

1. Enter your individual Username and Password (supplied to you by ILM)
2. Click the 'Login' button

Understand the navigation

Once logged in, you will see the following navigation bar across the top of your view.



Get more help

Tune into our pre-recorded webinars, which demonstrate exactly how to use the Portal.

Within the Portal itself, scroll down to the footer to view online **Help** and **Legal** terms. The **Contact ILM** link in the footer enables you to send us an email at: **AssessmentPortal@i-l-m.com**

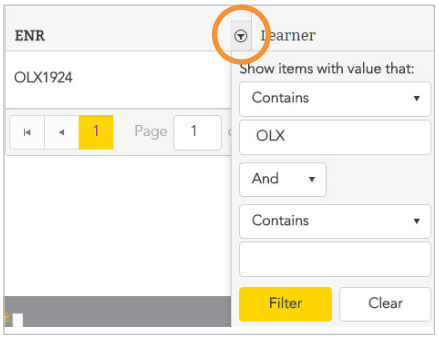
How to filter, sort and browse

You will have a lot of information at your fingertips within the Portal. There are some simple techniques you can learn to call up what you want, when you want it.

Filter

The fastest way to find information is to click the filter next to any column.

We recommend you practice using the filters during your first few sessions. Click on the **Unit Assessment** or in the top navigation, for example.



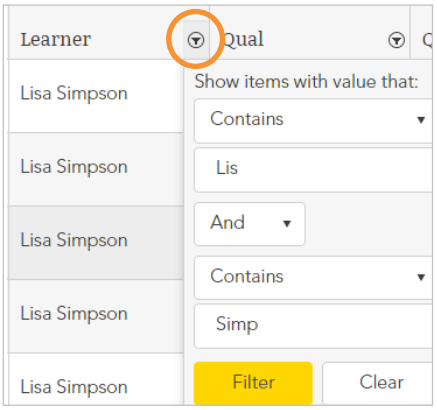
Filter on text and numbers

1. Next to the **ENR** column, for example, click the filter icon
2. Under 'Contains' box, enter the first few characters of the record you want to see, then click on the Filter button

> **Tip:** If you select the drop-down 'Is Equal To', rather than 'Contains', you must enter all characters exactly.

3. When finished, clear all filters by clicking on the Clear Filter button

Filter on Learners



1. Next to a **Learner** column, click the Filter icon
2. Enter the (full or partial) **first name** in the first box under 'Contains'
3. Enter the (full or partial) **last name** in the second box under 'Contains'
4. Click on Filter
5. When finished, clear all filters by clicking on Clear Filter button

Filter on dates

Data will remain on the system for up to three years. To help you find entries made in a particular time period, you can use the filtering tool.

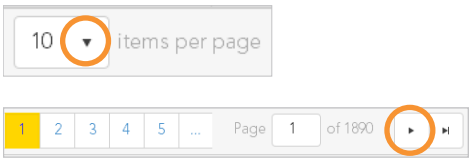
1. Next to the column heading **Registration Expiry** dates, click on the filter icon
2. To look for entries after a specific date:
   - **a.** Select 'Is After'
   - **b.** Click on the calendar icon, select a date then click on Filter
   - **c.** When complete, reset by clicking on the Clear Filter button
3. To look for entries on one date only:
   - **a.** Select '**Is After**' in the top box and '**Is Before**' in the bottom box
   - **b.** Use the calendar icon again to select dates either side of the date you want
     E.g. for **9 January**, select **Is After 8 January** AND **Is Before 10 January**
   - **c.** Click on 'Filter' to see results
   - **d.** When complete, reset by clicking on the Clear Filter button

> **Tip:** If you don't clear a filter, you are asking the dashboard to show you results within your already-filtered items. When in doubt, always click on Clear Filter

Browse

At the bottom of any view you can:

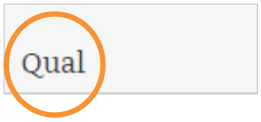
1. Expand the items you see on the page
2. Move to any existing next page(s)



Sort

Click on a column heading in any view to change the order the data is displayed

Try doing this on the **Qual**, **ID** or **Learner** columns, for example.



Zoom in and out

On the Portal, you can enlarge and reduce the size of the text.

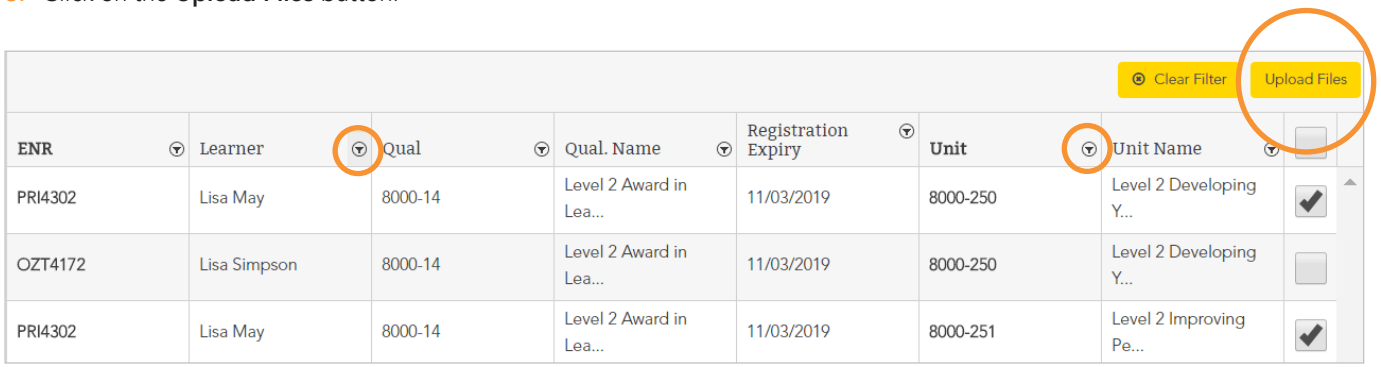
1. Zoom in: click the Ctrl and + ('plus') keys on your keyboard
2. Zoom out: click the Ctrl and – ('minus') on your keyboard

Unit Assessment

Go to this area on the Portal to upload files for **single unit assessment**. This is where each of your learner assessments will be marked against **one ILM unit**. If one learner completes five units, for example, these are five separate assessments.

Select the learner and unit
The first screen lists all the learners you have already registered against an ILM Assessment qualification on our **Walled Garden system** and all the units within.

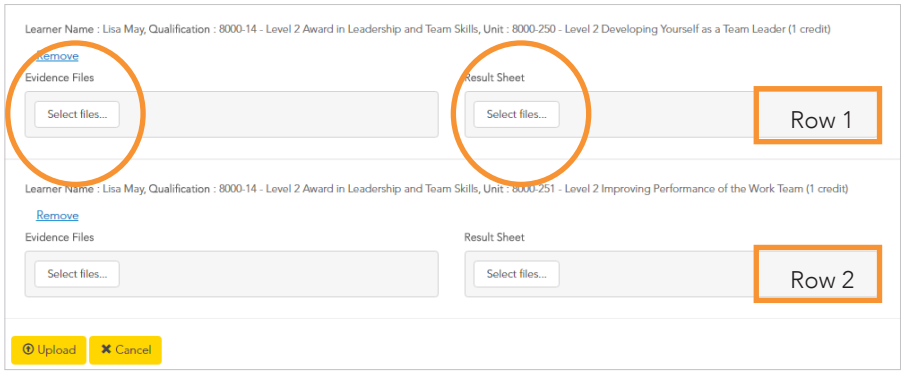
1. Call up the relevant unit and learner(s) you wish to upload files for. Example:
   - **a** Click on the filter icon next to the **Unit** column and call up the unit code
   - **b** Next, if you wish, filter for name under the **Learner** column
2. Check the relevant box on the right to confirm your selection
3. Click on the **Upload Files** button.



Upload files for unit assessment

Having clicked on the **Upload Files** button, you will see a screen like the one below.

If at the previous step you selected multiple checkboxes, you will see multiple rows. Next to each row, you can see the 'Learner name', qualification and unit details. To remove a single row, click on the **Remove** link next to it, then 'OK'. This will remove the upload for that learner only. It will not remove them from the system.



To upload files, follow the steps listed below:

1. Under **Evidence Files** in the top row, click on **Select files**. Select one or more files that the learner has produced for assessment.
2. Under **Result Sheet**, click on **Select files**. Select the template Result Sheet provided by ILM for marking this assessment (also known as the 'Mark Sheet').
3. Repeat steps 1-3 if you have multiple rows
4. After you've selected all files, click the Upload button (max **150 MB**)

Tips

Want to cancel uploads?
If you make a mistake and don't want to go ahead with an upload, click Cancel

Upload speed issues?
The speed of your uploads depends on the speed of your internet connection.

For slower internet speeds, or large file sizes, you may wish to select only a few rows at a time for uploads, then return to the Unit Assessment page to select more rows.

What about existing ILM guidance?
Please continue to follow ILM policy guidance on file naming conventions and embedding Declarations of Authenticity into your submission.

You will then be taken to the **Pending Submission** section of the Portal.

If you want to upload more assessments, go back to the **Unit Assessment** section and repeat all the steps in this section.

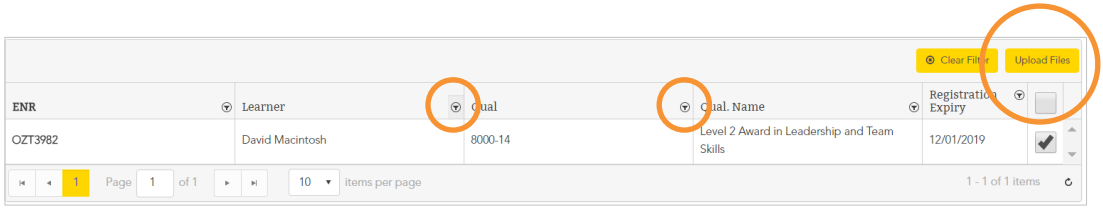
Integrated Assessment

Go to this area on the Portal to upload files for **Integrated Assessment**. This is where one collection of evidence from a learner is to be assessed in relation to multiple units within an ILM Assessment qualification. You **must have** prior ILM approval for these.

(For example, evidence from a Health and Safety presentation is to be assessed against one unit on Health and Safety and a further unit on effective communication.)

Select the learner and qualification

The first screen lists all the learners you have already registered against an ILM Assessment qualification on our **Walled Garden system**.

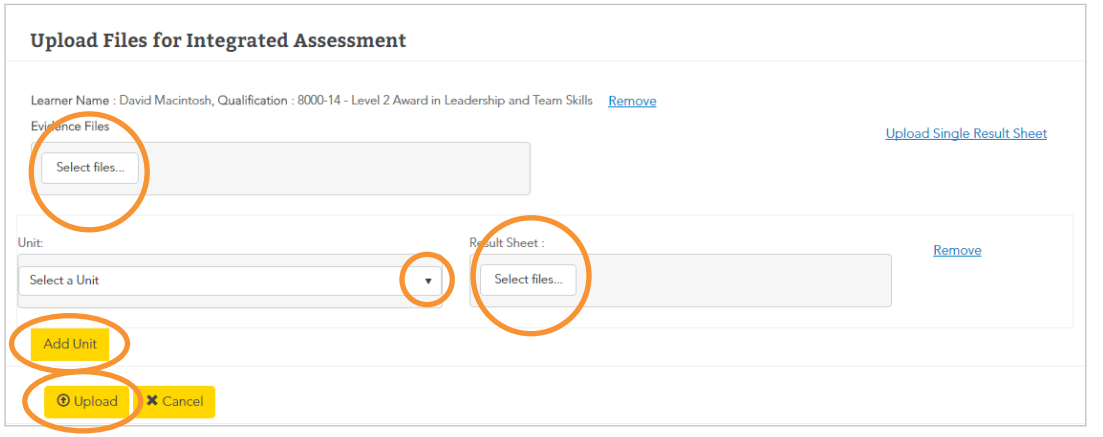


Call up the relevant qualification and learner for your upload:

- **a.** Click on the filter icon next to the '**Qual**' column to pull up the Qualification
- **b.** Next, filter for name under the '**Learner**' column
- **c.** Check the relevant box on the right to confirm your selection
- **d.** Click on the **Upload Files** button Upload

Upload files for integrated assessment

Having clicked on the **Upload Files** button, you will see a screen like the one below. You will see the 'Learner name' and qualification at the top.



1. Under **Evidence Files**, click on **Select files**. Select one or more files to upload.

2. **Select a Unit** that the evidence should be assessed against from the drop-down.

3. To the right, under **Result Sheet**, click on **Select files**. Select the template Result Sheet provided by ILM for marking this unit (also known as the 'Mark Sheet').

4. Add a second unit for the evidence to be assessed against: Add Unit
   a. A drop-down list will appear; select the relevant unit title from this drop-down.
   b. To the right, select the ILM template Result Sheet for the unit
   c. Click Add Unit again, if you need to add a third or fourth unit.

5. After you have selected all files, click the **Upload** button (max **150 MB**)

You will then be taken to the **Pending Submission** section of the Portal.

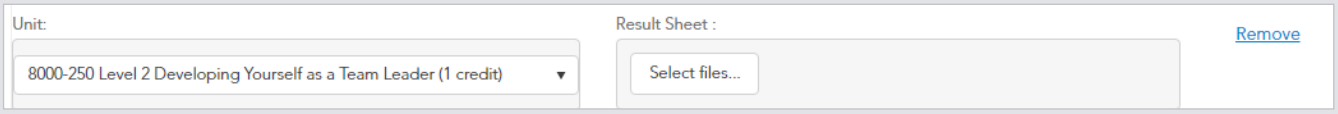
If you want to upload more assessments, you can go back to the **Integrated Assessment** section and repeat the steps outlined above.

Tips

Want to cancel uploads or remove units?

If you make a mistake and don't want to go ahead with any uploads, click ✖ Cancel

If you want to remove one of the selected unit rows before an upload, click on the **Remove** link next to that row, then **OK**.



What does this mean?

Upload Single Result Sheet

This is for potential future use when Result Sheets may be re-designed. You do not need to click on this link for now. If you do experiment with this tool, please ensure that the 'Upload Single Result Sheet' option appears back on the screen before you upload any files.

Other tips

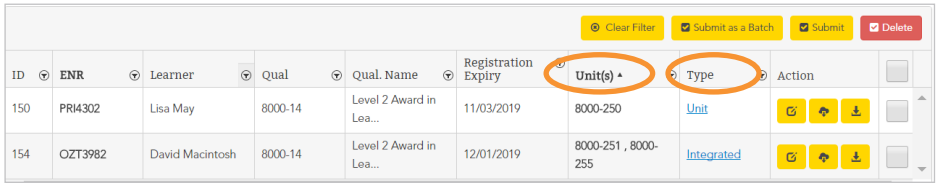
Please also see the Unit Assessment tips in this guide.

Pending Submission

Once you've uploaded files for any type of assessment, you will be taken to this section of the Portal. From here you can check, edit and submit assessments to ILM.

Check your uploads

1. **Unit Assessments** contain one unit code, whilst **Integrated Assessments** reflect the multiple units you uploaded. The difference is highlighted in the Type column.



2. **Check the units you** are preparing to submit.
   a. Click on the **Unit** or **Integrated** link under Type. To finish, then click ✖ Cancel

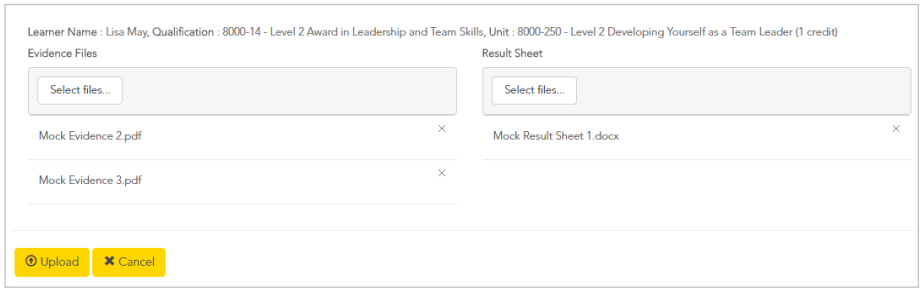
3. **[Optional]** Remove an assessment from Pending, select the checkbox next to it, then click on the ☑ Delete button

4. **Check for uploads with no Result Sheet** (You may have forgotten to upload one)
   a) Faded download icons indicate no Result Sheet
   b) If you hover over a faded icon you get the message: 'No Result Sheet'

5. **Add or remove items in an upload** by clicking on the Edit icon
   a) If you want to come out of Edit mode without having made any changes make sure to click on the ✖ Cancel button

[Optional] Edit your uploads

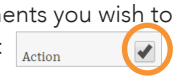
Having clicked on the **Edit** icon, you can see more details about each assessment



1. Notice the 'Learner Name' and details at the top
2. Remove any files you've uploaded by clicking on the cross:
3. To upload any missing files:
   a) Click on the relevant **Select files**… button
   b) Click the **Upload** button. This takes you back to the main Pending view.

Submit assessment(s) to ILM

152	OXZ2356	Daniel moss	8000-14	Level 2 Award in Lea...	06/01/2019	8000-250	Unit	
151	OZY7570	Erin Test	8000-14	Level 2 Award in Lea...	13/01/2019	8000-250	Unit	
150	PRI4302	Lisa May	8000-14	Level 2 Award in Lea...	11/03/2019	8000-250	Unit	

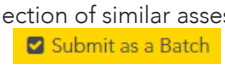
1. Select one or more checkboxes against the assessments you wish to submit or select all items quickly by clicking the top checkbox: 

2a. For a simple submission:

- Click on the **Submit** button

- Confirm the quality of the submission and click on OK

2b. To submit as a batch (helps track a collection of similar assessments):

- Click on the **Submit as a Batch** button 

- Enter a batch name (min 3, max 20 characters)
- Confirm the quality of the submission and click on OK

Upon submission you will receive a confirmation notice. Click on OK.
This will take you to the Tracker section of the Portal.

[Optional] Take copies of the files you've uploaded

Within Pending Submissions, you can also download copies of files before you submit them. Try hovering over the following icons then clicking on them*:

 Download Evidence icon

 Download Result Sheet icon (faded icon where no Result Sheet is uploaded)

Tips

***The way you download** depends upon the browser you use and your browser settings. See our starter examples below. Look at your browser's Help section for details of what will work for you.

Evidence files for an individual assessment will be downloaded into one **zip file**

Result Sheets are always single files, so will be downloaded **unzipped**.

Google Chrome example

- Click any of the download icons. After a few seconds, the download appears at the bottom of your screen. Click on the arrow next to the file. Select **Show in Folder**.

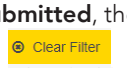
Microsoft Edge or Internet Explorer example

Either click or right click a download icon. After a few seconds, select **Save File As** (may appear as **Save Target As**). Select a location to save your file to and click 'Save'.

Tracker

This section of the Portal is where you can track assessments you've submitted to ILM.

Review 'Submitted' assessments

1. Click the filter icon next to the **Status** column:
2. Under 'Is Equal to', select **Submitted**, then click on 'Filter'. Rows appear blue.
3. Click on Clear Filter to finish 

4. Explore the other columns on the dashboard, summarised below:

Tracker column	How it helps
ID	On the far left, you will see that each assessment has a unique ID
Batch	If you created a Batch name upon submission, it will appear here. You can filter for a name by entering characters under 'Contains'
Submitted	This displays the actual date of your submission to ILM
SLA Target	This initially displays 25 working days after the **Submitted** date, in accordance with ILM's Service Level Agreement (SLA) to issue results. The field will go blank if an assessment is Rejected by ILM. Once ILM has issued results, the field changes to reflect the actual day the results appear in the Tracker.
ENR, Learner and Unit(s)	Enrolment number (ENR), learner and unit codes. The same data is on Walled Garden. Unit codes also appear in ILM's 'Guide to Fees'.
Category	**New =** First ever assessment sent to ILM for this unit and learner. **Updated =** Re-submission, following a **Rejection** notice from ILM **Re-Assessment** = Re-submission following a Referral result from ILM. This incurs a cost, as outlined in the ILM Guide to Fees.
Result and Mark	These fields only populate when ILM issues results.
Action	From here, you can download Result Sheets when results are issued. You can also re-submit following a **Rejection** or **Referral.**

Tips

Practice the filtering techniques shown in this Guide and in the webinars. Log on and filter for relevant information on a regular basis. (We do not use automated email notifications, as customer feedback shows a preference to avoid email clutter).

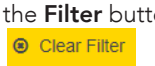
Data will be stored for up to three years before permanent archiving. You will need to make a decision, suitable for your Centre, about how long you wish to save your own records.

Check for Results

The status of assessments changes from Submitted when results are issued to:

- **Completed** – for all 'Pass' results
- **Referred** – for all 'Referral' results

To check for results, filter for **Completed** OR **Referred** items:

1. Click the filter icon next to the **Status** column:
2. Under 'Is Equal to', select **Completed** (first selection)
3. Select **Or**
4. Under 'Is Equal to', select **Referred** (second selection)
5. Click on the **Filter** buttonDon't forget to click on 'Clear Filter' when you have finished 

See the section in this Guide about how to Respond to Referrals.

Download Result Sheets

This option applies for items with the 'Completed' or 'Referred'

1. To download one Result Sheet, click on the download icon, right:
2. To download multiple Result Sheets:
   - **a)** Select the checkbox next to each item you want to download, right:
   - **b)** Click the Download Result Sheets button: Download Result Sheets

A single file will download on its own, unzipped. A collection of files will be zipped. Please see the notes on downloads earlier in this Guide.

Export data to Excel

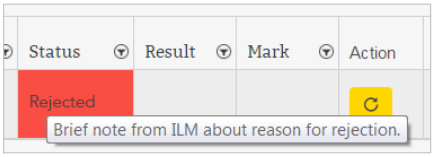
You can export data from the Tracker to Excel (excludes Result Sheet files).

1. Filter for the information you require. Example:
   - **a.** 'Completed' items
   - **b.** 'Is After' a particular date in the SLA column
2. Click the Export to Excel button, top left: Export to Excel
3. The file name will contain the current date and the title, 'Centre Report'.

> **Tip**
> Always filter for relevant items first before Exporting.
> This ensures a speedy download.

Check for Rejected assessments

ILM may reject an assessment, if it contains missing or incorrect information or files. In the event of plagiarism, we will reject the assessment and will also email you a separate report outside of the Portal.



Check regularly to see if any assessments have changed from **Submitted** to **Rejected**

1. Click the filter icon next to the **Status** column:
2. Under 'Is Equal to', select **Rejected**, then '**Filter**'. Rows will appear red.
3. To narrow the search further, also filter on the **Batch** or **Submitted** columns

To see the reason for rejections, hover over the '**Rejected**' cell.

Respond to Rejected assessments

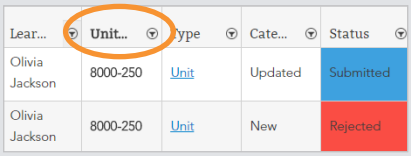
Follow one of the two available options:

1. In the **Action** column, click the **re-submit icon** next to the rejected item

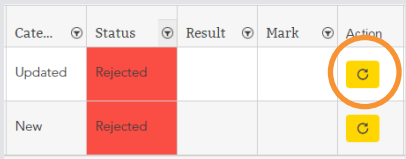
You will then be prompted to upload the files and submit again to ILM.

2. Go back to the **Unit Assessment** or **Integrated Assessment** (whichever is relevant) section where you can select the unit and learner from scratch, upload the files and submit to ILM.

> **Tips**
> You can track repeat submissions by filtering on the **Learner** and **Unit** columns.
>
> In the example opposite, notice that the first ('New') item was rejected.
> The **Updated** version is in Submitted status.
>
> Each row is a record with its own unique ID.
>
> If an **Updated** item is also rejected by ILM, then the status will change to **Rejected**, as on the right:
>
> To re-submit yet again, click the re-submit icon for the **Updated** item.
>
> The latest record always has the higher ID
>
> Always re-submit against the **latest record** (higher ID) for a particular unit and learner
>
> - If you try to re-submit against an earlier record with a lower ID, this message appears:
>   *You have already re-submitted this assessment. This is an old record.*
>   *For further re-submissions, select the latest record on your Tracker.*



Each row is a record with its own unique ID.



Each row is a record with its own unique ID.

Respond to 'Referrals'

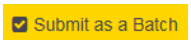
If ILM issues a 'Referral' result for an assessment, you have the opportunity to re-submit on behalf of the learner for a fee, as outlined in the ILM Guide to Fees.

This type of re-submission is classed as a **Re-assessment** on the Portal because you are effectively asking for learner evidence to be re-assessed and marked again.

Responding to Referrals is very much like responding to **Rejected assessments.**

1. Under the Status column, filter for items equal to 'Referred'.
   - To see the reason for the referral, download the Result sheet

2. Under the Action column, click on the Re-submit button
   - Alternatively, as with Rejections, go to **Unit Assessment** to upload from scratch

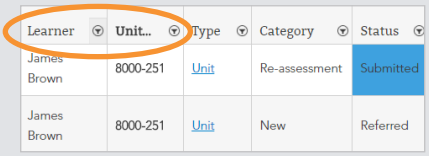
3. At the point of submission, select 

and enter your Purchase Order number for invoices in the Batch Name e.g. PO 2345678
   - Please **do not** upload financial documents together with learner evidence.

Tips

You can track repeat submissions by filtering on the **Learner** and **Unit** columns.

In the example opposite, noticed that the first ('New') item was **Referred**. The **Re-assessment i**s in **Submitted** status. Each row is a record with its own unique ID.

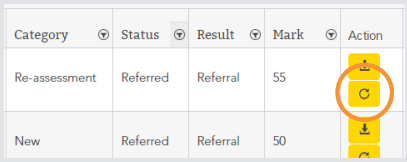


Learner	Unit...	Type	Category	Status
James Brown	8000-251	Unit	Re-assessment	Submitted
James Brown	8000-251	Unit	New	Referred

Each row is a record with its own unique ID.

If a **Re-assessment** item is also referred, then the status will change to **Referred**, as on the right:

To re-submit yet again, click the **re-submit** icon next to the **Re-assessment** item.



Category	Status	Result	Mark	Action
Re-assessment	Referred	Referral	55	
New	Referred	Referral	50	

The latest record always has the higher ID

Always re-submit against the latest record (higher ID) for a particular unit and learner

- If you try to re-submit against an earlier record with a lower ID, this message appears:
  You have already re-submitted this assessment. This is an old record. For further re-submissions, select the latest record on your Tracker.

Troubleshooting

How do I zoom in and out of my screen?

Please refer to the last item in the how to **Filter, Sort and Browse** section of this guide**.**

I can't see all the columns on my screen!

This may occur if you have manually expanded or reduced the column sizes

- You can hover over a column header boundary so that your cursor is a crosshair
- You can then drag a column to expand it, but you may push some data out of view

To re-centre the data and columns, click on the **Ctrl +R** buttons together.

I've received some error messages

Double log-in – If a colleague logs into the Portal at the same time as you with the same username or password, the system will register a security breach. Please contact us via the Contact Us link on the log in page if you need to set up a new user on the system.

Using browser buttons in error – We recommend you use buttons like 'Cancel' or 'Delete' that appear within the Portal, rather than the back button in your browser. If not, the system may register a security breach.

I appear to have logged out during a session, but can't get back in again

This may occur if you have used your browser's 'back' button by accident. On the main log-in page, click the **LOG IN** link to the top right. If this does not work, try closing and opening your browser.

I can't log in using my normal username and password

Please check your username and password. If you cannot remember them, please get in touch with us via the Contact Us link on the log in page.

You may not be able to log in if ILM has raised a financial issue with your Centre, such as a missed payment. If this is the case, your Portal account may be blocked.

I can't see the latest data!

The Tracker will remain blank until your Centre first submits an item to ILM for marking.

Ensure you have cleared all filters

and refresh the table, bottom right:

Ensure you keep your browser up to date and use the latest version.

On occasions, you may need to delete out-of-date images and files stored in your browser's memory ("the cache"). Press Ctrl+Shift+Delete buttons together to delete the cache.

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This document is intended for internal use by ILM Assessment Customers ("Centres") in relation to training to use the ILM Assessment Portal.

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Leadership without limits