**Using the Approved Centre
Sign-In Page on the JAUPT Website**

Version 5
Date: February 2018

Contents

1. Introduction

Throughout 2016, JAUPT introduced the following features to the website for Approved Centres:

- Individual Uploader for Planned Training
- Mass Uploader for Planned Training
- Edit and Cancel Functions for Planned Training
- Planned Training History View
- View of Quality Assurance Reports for Centres/Courses
- Online Submission of Feedback for Quality Assurance Centre/Course visits
- Print option for Quality Assurance Reports…….
- And many more!

This User Guide provides you with step-by-step instructions on how to use the various functions on the website easily and effectively.

2. Sign In

Once you become an approved centre you should have received a login user name and password.

If you do not receive this within 5 working days, please contact us at enquiries@jaupt.org.uk

Enter your Email Address (Username) and Password and click **'Sign In'**:
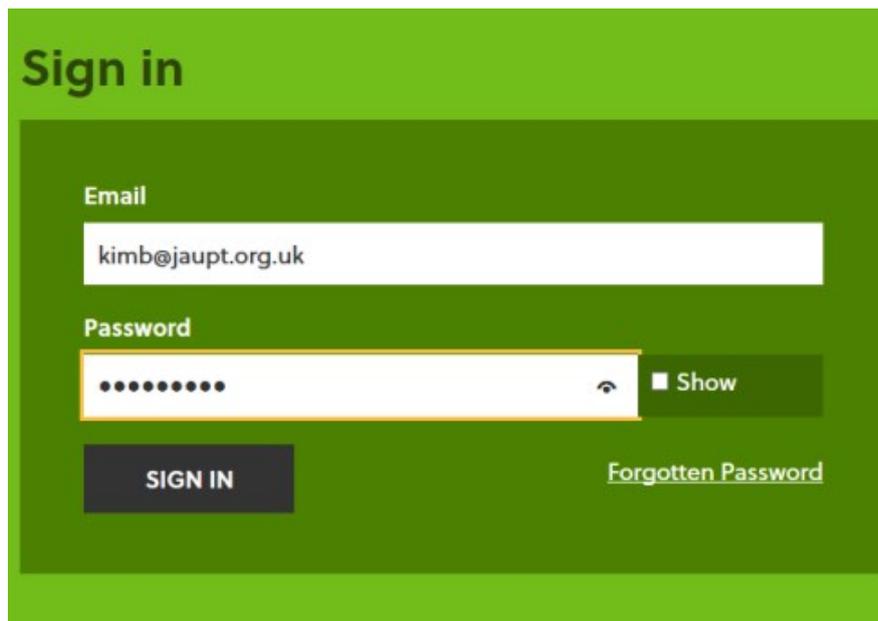
Figure 2.1

> **JAUPT TIP!**
> **Please ensure that your password is memorable, and you click 'Show' to ensure you are entering the correct password. Failure to enter your password correctly <u>three times</u> will mean that your account is locked out of the system.**

3. Centre Overview

Once you have successfully signed into the JAUPT website, you should see the *Centre Overview* tab:

The details displayed on the *Centre Overview* page refer to the details of the centre and not a specific person. This information will be visible to the public if the centre has been requested to publish their details.

3.1 Editing Centre Details

PLEASE NOTE
Any changes to your centre details are updated through the JAUPT website as soon as possible. It is <u>your</u> responsibility to ensure that our records are up to date.

There are many changes which you can make to the details of your centre, these include:

- Centre Name
- Centre Contact Details
- Primary/Responsible Contact Details
- Correspondence Address
- Registered Address (if applicable)
- Companies House Number (if applicable)
- Addition of centre administration users
- Addition of trainers

The details highlighted within the blue box, shown in the diagram below will be visible to the public if the centre has requested to publish their details.

To edit your centre details, select the *Edit Centre Details* button as shown below:

The display shown below will become available.

Once you have made the desired changes then click the *Save* button at the bottom of the page. Any unwanted changes can be cancelled by selecting the *Cancel* button at the bottom of the page.

Edit centre

Centre name ♻

    JAUPT

Phone number

    0844 800 4189

Email

    enquiries@jaupt.org.uk

Website

    http://www.jaupt.org.uk

Make this centre public?
Public centres will appear in search results on the Jaupt website.

    ○ Yes
    ● No

PLEASE NOTE!
Some changes will not automatically update as they will require validation from your Account Manager. These are fields which have a green 'recycle' symbol. Once validated and authorised changes will appear 20 minutes later, and you will receive an email confirmation. If the request has been refused you will receive an email confirmation.

3.2 Adding Centre Administration Users

Administration Users have read-only access to some of the Centre Details, Quality Assurance Reports and can upload training schedules.

The Responsible contact can add more Administration Users to the JAUPT website by clicking on the *Add New Centre Admin* on the *Centre Overview* page as shown below:

JAUPT

Phone	0844 800 4189
Email	enquiries@jaupt.org.uk
Address	9 Warren Yard, Warren Park, Milton Keynes, MK12 5NW

EDIT CENTRE DETAILS

Centre admins   Trainers

ADD NEW CENTRE ADMIN

JAUPT TIP!
Keep a record of who has access to your centre page on the JAUPT website, and for data protection, remove any users as soon as possible if they no longer require access.

The following display will show. Please ensure you provide a full name of the user and a valid email address. Once you have added the details for the user, then select the *Submit* button.

New user

Name

Email

SUBMIT   CANCEL

An e-mail should automatically send to the e-mail address of that user, requesting the user to create a password for their access.

PLEASE NOTE
The new password created must:
- **Be a minimum of 8 characters**
- **Contain at least one upper case letter**
- **Contain at least one number**

3.3 Deleting/Unlocking a Centre Administration User

The *Centre Overview* page will have a section called *Centre admins*, if you wish to delete user or unlock their access, select their name from the list shown below:

To delete a centre admin user, click the red *Delete* button. If you need to unlock a user, click the blue *Unlock* button.

3.4 Add, Update or Remove a Trainer

3.4.1 Add a Trainer

To add a trainer, click on the *Trainers* tab within the *Centre Overview* and click on *Add New Trainer* as shown below:
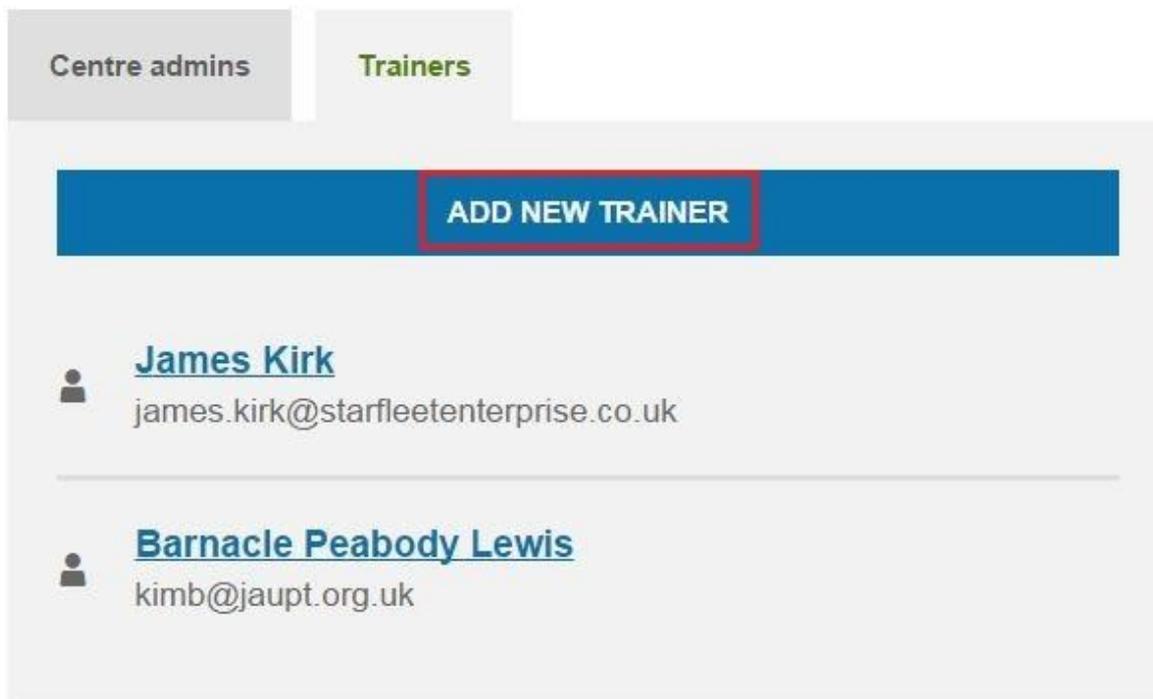
You will need to add the following information for each trainer:

- Full Name
- E-mail address
- Qualifications and/or Experience
-

Once you have entered the trainer's details, click the *Save* button at the bottom of the page.

3.4.2 Update/Remove a Trainer

To update a Trainer's details, select the trainer name from the list shown on *Trainers.* The following details will show:

Trainer Details

First name

Company

Last name

Name Test

Email

companynametest@jaupt.org.uk

Qualifications and experience

This is a test

<div align="center">

| SAVE | DELETE | CANCEL |

</div>

Change or update the required details and click the blue *Save* button. To remove the trainer, click the red *Delete* button. Our internal records will update automatically.

PLEASE NOTE
It is <u>your</u> responsibility to ensure that trainer details are up to date.
Trainer details are NEVER published.

4. Course Overview

You can view the details of any approved courses by selecting the *Course Overview* tab from the menu shown on the left-hand side.

By selecting a course from the list, you will be able to view the details which includes if it is published on the search facility. This information will be visible to the public if the centre has requested to publish their details.

4.1 Editing Course Details

PLEASE NOTE
Any changes to your centre details are updated through the JAUPT website as soon as possible. It is <u>your</u> responsibility to ensure that our records are up to date.

The *Course Overview* section will provide a list of all your currently approved courses, to edit a course select the course title from the list.

You can change a few course details, these include:

- Course Objectives
- Trainer/Driver Ratio
- Making the Course Public

All You Need To Know - Modular Course

Public	Not publicly viewable
Expiry Date	Expires 07 February 2017
Trainer/Driver Ratio	20:1

Course objectives

This courses covers the entire syllabus for Driver CPC

EDIT

The display shown below will become available.

Edit Course

Course objectives

This courses covers the entire syllabus for Driver CPC

Trainer/Driver Ratio ♻

20:1

Make this course public?

Public courses will appear in search results on the Jaupt website.

○ Yes

● No

SAVE　　　**CANCEL**

Once you have made the desired changes then click the *Save* button at the bottom of the page. Any unwanted changes can be cancelled by selecting the *Cancel* button at the bottom of the page.

PLEASE NOTE!
Some changes will not automatically update as they will require validation from your Account Manager. These are fields which have a green 'recycle' symbol. Once validated and authorised changes will appear 20 minutes later, and you will receive email confirmation. If the request has been refused you will receive an email confirmation.

5. Scheduled Training Dates

As an approved centre you **must** tell us about all your planned training.

> **PLEASE NOTE!**
> **We monitor and analyse data on a regular basis. If you are found to not have told us about your planned training you will be subject to the 'escalation process' which ultimately, may lead to the suspension/withdrawal of your centre approval.**

There are two ways you can easily tell us about training; individually or mass.

5.1 Add an Individual Course Date

To upload an individual date, go to the *Scheduled Training Dates* tab and select the *Add Individual Date* button as shown below:

From here, you will able to add a training date to a specific course and consortium member (if applicable).

> **JAUPT TIP!**
> **Use the individual uploader if you have between approximately 1-5 courses to do at a time.**

Once you have made the desired changes; then press the *Save Changes Made* button at the bottom of the page.

5.2 Add Multiple Course Dates

Figure 7.3

Once you have downloaded this file you can save it and reuse it, and keep your training dates in one document.

To upload your training dates, you will need to complete the spreadsheet with details of the courses that you have planned as follows:

Column A | Centre No: This is a required field for each row and should be entered in upper case (with capital letters) e.g. AC99999

Column B | Centre Name: This is a required field for each row, please make sure this is exactly the same as the name on your centre approval documentation e.g. You may have told us you wanted to be approved as JAUPT instead of the Joint Approvals Unit for Periodic Training.

Column C | Course Number: This is a required field and should be entered in upper case with no spaces e.g. CRS999/99999

Column D | Course Name: This is a required field for each row

Column E | Course Date: This is a required field for each row and needs to be entered in the exactly this format dd/mm/yyyy (e.g. 13/11/2015)

Column F | Start Time: This is a required field for each row. This field must be entered in a 24 hour clock format. E.g. 18:00 for 6pm or 09:00 for 9am

Column G | Finish Time: This is a required field for each row. This field must be entered in a 24 hour clock format. E.g. 18:00 for 6pm or 09:00 for 9am

Column H | Trainer: This is an optional field

Column I | Training Venue Name: This is an optional field

Column J |Address Line 1: This is a required field for each row

Column K |Address Line 2: This is an optional field

Column L |City: This is a required field for each row

Column M |Postcode: This is a required field for each row. You need to enter a space between the first and second parts of the postcode. E.g. MK12 5NW

Column N | Secure Access: This is an optional field. If the training venue has any specific access requirements that your attendees need to know about, add them in this field.

Column O | Delivery Location: This is an optional field

Column P | Additional comments: This is an optional field

Column Q | Publish: This is an optional field and is used to determine if you wish for the course date to be published to the JAUPT website.

Save the file.

PLEASE NOTE
DO NOT add or delete columns to the spreadsheet
CHECK that you have entered the dates and times in the format required
ENSURE that the postcode details have been entered using a space
The delivery location should state if the course will be delivered in a **Classroom**, **In-Cab** or **Yard** this is particularly important for modular courses
Please **DO NOT** change the file type of the spreadsheet – the system will **ONLY** accept Excel files with the extension .xlsx or .xls
If any of this is incorrect you will get a system error

Once your spreadsheet contains the training dates that you want to upload, go to https://www.jaupt.org.uk/centre-overview/scheduled-training-dates/upload-training-dates and click the *Choose File* button to select the spreadsheet that you wish to upload.

When you have selected the file, click the *Upload Dates* button to add your training schedule to the website.
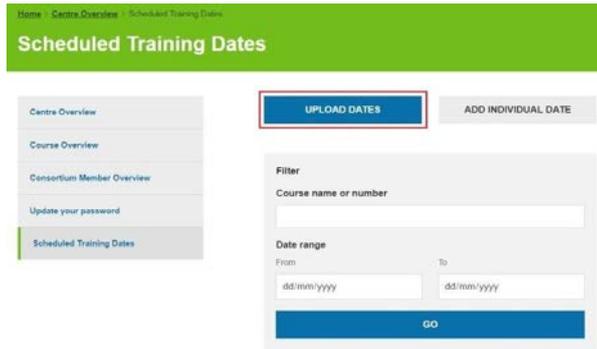
5.3 Splitting Courses over Multiple Days/Overnight Courses

If you are splitting a 7-hour course into two 3.5-hour parts, then you must upload two individual dates of 3.5 hours as shown below:

Day One
Date – 01/02/2017
Start Time – 20:00
End Time – 23:30

Day Two
Date – 02/02/2017
Start Time – 09:00
End Time – 12:30

This also applies to overnight courses and courses over 7 hours e.g. 14 hours. We must hold a record for the start day and completion day. For example:

Day One
Date – 01/02/2017
Start Time – 20:29
End Time – 23:59

Day Two
Date – 02/02/2017
Start Time – 00.00
End Time – 03:30

OR

Day One
Date – 01/02/2017
Start Time – 08:00
End Time – 16:00

Day Two
Date – 02/02/2017
Start Time – 08:00
End Time – 16:00

5.4 Training Receipts

After each successful upload you will receive an email receipt. You must keep the receipts as an auditable trail of any notified training dates, changes and cancellations.

<div style="background-color:orange;">

JAUPT TIP!
All receipts will be sent to the nominated Primary Contact and Responsible Contact. If they do not need to be received by both contacts, we suggest creating a redirect rule within your email account. The receipt will be sent from feedback@jaupt.org.uk therefore please ensure any emails sent from this address are not marked as junk/spam.

</div>

An example of the e-mail can be found below:

From: feedback@jaupt.org.uk [mailto:feedback@jaupt.org.uk]
Sent: 18 August 2016 12:52
To:
Cc:
Subject: Training Record Receipt

The following scheduled training has been cancelled via the JAUPT website:

Records Cancelled:

Course Date: 27/09/2016
Course Number:
Start Time: 7:45
Finish Time: 15:30
Postcode:

This record should be retained for quality and monitoring purposes. Please contact JAUPT if you believe this information is incorrect.

What if it didn't work?

There are two types of upload failures that can occur with the system. If your spreadsheet is in the wrong format (for example you have deleted a column that contains a required field) then none of the records that you have uploaded will be added to the website.

If the spreadsheet is in the correct format, but you have made an error in an individual cell an error message will be displayed telling you what you have done wrong. In this case you just need to correct the error in that cell, save your spreadsheet and upload it again.
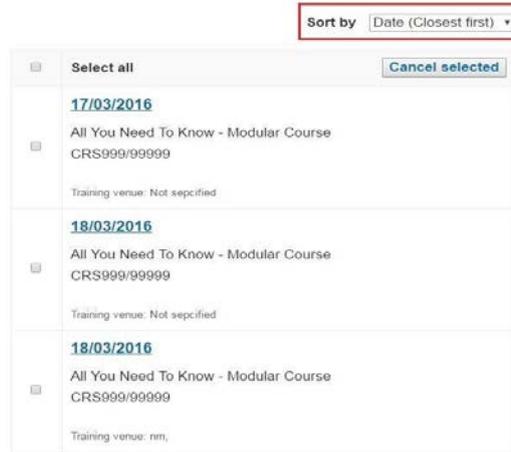
The system has been designed to remove duplicate entries automatically, so you can re-upload a corrected spreadsheet without needing to delete the rows that were successfully added to the initial upload.

5.5 Edit Planned Training Records

PLEASE NOTE!

Scheduled training dates are live and therefore any changes you make will be made on JAUPT records. Changes should be made <u>48 hours</u> prior to the course date.

If you wish to change the start and finish times, location of the training or date of the training, select the *Scheduled Training Dates* tab which will provide you with a list of training dates.

JAUPT TIP!
You can sort the how the dates appear by using the Sort by drop-down list shown by a red box above.

5.5.1 Changing Start and Finish Times

Select the course date which you wish to edit by clicking into the course date.
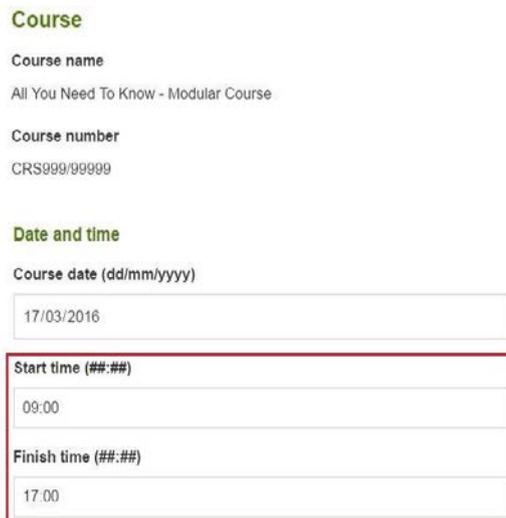
Once you have made the changes to the start time and/or finish time of the course, scroll down to the bottom of the page and then select the *Save Changes Made* button.

5.5.2 Changing the Address Details, Trainer Name and Venue

You change the location of the training and the trainer who will be delivering the training by going to the following section of the training record:

The venue

Trainer name

Joe Bloggs

Venue name

JAUPT

Address 1

9 Warren Yard Warren Park

Address 2

Stratford Road

City

Milton Keynes

Postcode

MK12 5NW

5.5.3 Changing Delivery Location, Comments and Publishing

You can change the *Delivery Location* field which confirms how the course will be delivered. For instance, if the course is going to be delivered in a classroom-based environment or within a yard. The following options can be selected:

- Classroom
- In Cab
- In Cab/Classroom
- In Yard
- In Yard/Classroom

The *Secure access* field allows you to tell us about any security requirements when we are accessing the training venue e.g.is there a gatehouse which the Quality Assurance Auditor must speak to?

You can make the course public on the JAUPT website (if your centre is published) to inform drivers/operators of when you will be delivering the course. The course dates will appear underneath the course name within the course search results and on the course page for that course.

Delivery Location

Classroom ▼

Secure access

Additional comments

Make this public?
○ Yes
◉ No

Once you have made the changes to the areas of the course required, scroll down to the bottom of the page and then select the *Save Changes Made* button.

JAUPT TIP!
Made a mistake? If you select the *Cancel Changes Made* button at the bottom of the page, it will cancel any amendments made to that course date and take you back to the *Scheduled Training Dates* page.
If you wish to change the course which is currently on a certain date, then you must cancel the original course and upload the training details again with the new course number.

5.6 Cancel Training Dates

PLEASE NOTE
You should inform us **48 hours** prior of the course date of any course amendments and/or course cancellations.

5.6.1 Cancel an Individual Course Date

If you wish to cancel a single training date, you will need to open the course date and then select the *Cancel This Training* button.

5.6.2 Cancelling Multiple Training Course Dates

If you wish to cancel multiple course dates, select the dates you wish to cancel from list and then select the *Cancel selected* button as shown below:

These dates will then be removed from the view and changed to Cancelled on the JAUPT database.

6. Quality Assurance

The Quality Assurance tab allows you to enter a *Centres* and *Courses* tab. Each tab provides a list of the centre/course Quality Assurance Visits in chronological order, starting with the latest as shown below:

6.1 Report Structure

Each record will provide a corresponding report made of five sections:

- **Executive Summary**
- **Report Observations**
- **Requirement Notices**
- **Action Points**
- **Continuous Improvements**.

Executive Summary:

This section contains a summary of the visit and will highlight any areas where action/improvement is required.

Report Observations:

This section is a more detailed summary of the visit. This section contains the auditor's feedback on what was observed during the visit.

Requirement Notices:

These are points raised where immediate and urgent action must be taken to remain compliant. Evidence is required of the action taken to address the point.

Action Points:

These are points raised by the auditor which require the centre to action. You must provide feedback in response to the points raised.

Continuous Improvements:

These are points raised by the auditor which should be implemented if the centre believes it will improve the quality of the training or processes used are robust to manage the programme.

6.2 Printing a Report

You can print the report by using the *Print* button located at the bottom of the centre/course record as shown below:

Continuous Improvements

CARS WEBSITE TEST
CARS WEBSITE TEST

QUALITY ASSURANCE   PRINT REPORT   SEND FEEDBACK
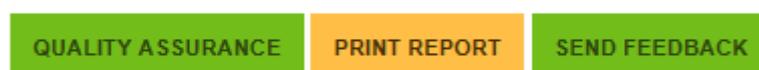
The *Quality Assurance* button will take you back to the Quality Assurance tab.

6.3 Send Feedback

If your Quality Assurance Visit identifies areas where feedback is required, you can provide this through the website by clicking on Send Feedback as shown below:

Continuous Improvements

CARS WEBSITE TEST
CARS WEBSITE TEST

| QUALITY ASSURANCE | PRINT REPORT | SEND FEEDBACK |

A new page will open as shown below:

Containment

Root Cause

Corrective Action

File
Please make sure you have attached all of the evidence in a single file as either a PDF, Excel or Word document, if you are not submitting an attachment please make sure you send us a blank sheet stating there is no evidence.

Browse...

| SUBMIT | CANCEL |

Containment

You will need to provide full details of what immediate action you took against **each** point raised to stop a recurrence.

Root Cause

You will need to provide full details of what happened to cause the error/non-compliance.

Corrective Action

You will need to provide full details of what action you have taken to address the matter permanently. In some cases, evidence may be required.

For the purposes of an example the following Action Points have been identified at a Quality Assurance Visit:

1. In order to confirm the trainees' ID and attendance on each day of the course the centre must ensure there is an audit trail of attendance and ID check records which must be completed on the day

2.The centre must ensure that each course introduction covers housekeeping including, as a minimum, a Health & Safety briefing and Fire evacuation procedures.

The below example shows how you can respond:

Containment

1. The trainer was reminded of the updated ID procedure and the importance of ensuring this is followed.
2. The matter was discussed with the trainer to ensure all Health & Safety aspects are covered.

Root Cause

1. The trainer had not been provided with the updated ID procedure
2. As the trainees work within the building it was assumed they knew the Health & Safety/Evacuation procedures etc.

Corrective Action

1. Please find attached the updated procedure for ID checks which has been issued to all trainers (also attached).
2. Please find attached a communication to all trainers reiterating the importance of a complete introduction inc. H&S

PLEASE NOTE
You **MUST** attach a file to submit feedback to JAUPT. Files can be Word, Excel, PDF.
If you do not have any evidence that is required a blank document must be attached confirming no evidence is being provided.

To attach the required file (or blank one if no evidence is required) click *Browse.* Choose the required file and double click. Click *Submit.*

The information will be reviewed by JAUPT. If further information is required, you will receive an email notification. If no further action is required, this will be confirmed in writing.

7. Historical Training Dates

You can view the training dates that you have told us about by using the Historical Training Dates functionality as shown below:

Centre Overview

Course Overview

Consortium Member Overview

Update your password

Quality Assurance

Scheduled Training Dates

Historical Training Dates

It may take some time but a list of historical training dates will be provided.

You can download the training dates to an excel file by clicking the button below:

DOWNLOAD
HISTORICAL TRAINING
RECORDS

You can also filter the dates by using the fields below:

Filter

DateRange
⚠

| 01/02/2016 | 31/04/2016 |

GO

PLEASE NOTE
.   If you are having issues or require assistance please contact your Account Manager directly, who will be able to provide you with the information you require.