



SAF Competence Test

Administrator Guide

This document has been created to assist SAF test administrators in using and maintaining the SAF competence test site. It also shows administrators how to get the most relevant information from the report section.

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Administrator's maintenance page

As a Master Administrator you are responsible for setting up accounts and accessing all SAF reports for your company.

Administrators are also responsible for maintaining details of individual users to ensure tests are retaken annually and staff details are up to date. Administrators are also expected to respond to any technical difficulties raised by staff.

Amendments to accounts may only be made by the Master Administrator or an allocated sub-administrator for the group.

Branch Maintenance:

Use the Branch function to set up departments or locations for your company, e.g. Head office or London office. If you only add one branch all staff will be registered under this. To add branches:

1. Open the administration tab
2. Click on branch maintenance
3. Click on add new branch and enter details

You will need to give each branch a code. If you do not have codes for existing branches within your company you can either number branches or enter a shortened code, for example, Head Office could be HQ.

You can also edit the names of existing branches while in the branch maintenance tab.

Role Maintenance

There are two main administrator roles which can be assigned to a user.

1. Administrator:

Branch administrators can register users, download user records and assessment results only for the branch assigned to them. Global administrators can create, amend and view role branch and assessment details for all users in company.

2. Monitor:

Branch and global monitors can be assigned to monitor company records, however they are unable to edit or amend user records.

The majority of registered users will be neither an administrator nor a monitor. These individuals will not be able to access company records, but will log in simply to take the test.

The status of the user can be assigned when **adding new users**, see section below.

Add roles for users:

Before adding users you must first make sure that you have added specific roles within your company. To do this:

1. Open the Administration tab
2. Click on Role Maintenance and add a role, usually the job title of the individual.

Add a new user:

1. Open the administration tab
2. Click on user maintenance
3. Click on add new user tab at bottom of page
4. Enter the individual's details; remember to include an email address if possible. You can also choose to make this person an administrator at the stage if you wish.
5. **Make sure you keep a note of the individual's login details.** If you have entered a email address for the individual their log in details will also be emailed to them.

The screenshot shows a web browser window displaying the Proficiency Solutions user management interface. The page is titled "User Maintenance" and "Adding a new User". The form includes fields for First Name, Last Name, Email Address, Office Phone, Mobile Phone, Date of Birth (with DD, MM, YYYY dropdowns), Role (currently set to "(unassigned)"), Branch (currently set to "Europa House"), Monitor Role (currently set to "Not a monitor"), and Admin Role (currently set to "Not an Administrator"). A "Submit" button is located at the bottom of the form. A callout bubble points to the "Admin Role" dropdown menu, containing the text: "Click here to make your new user an administrator".

Figure 1: Adding new users

Edit individual user details:

1. Open the administration tab

2. Click on user maintenance
3. Click on edit tab by the individual that you wish to amend. You will then be able to change details.

De-registering individuals on SAF competence test site

1. Open administration tab
2. Click on user maintenance
3. Find the individual that you require
4. Click on edit next to their name
5. On their profile change Active to NOT Active

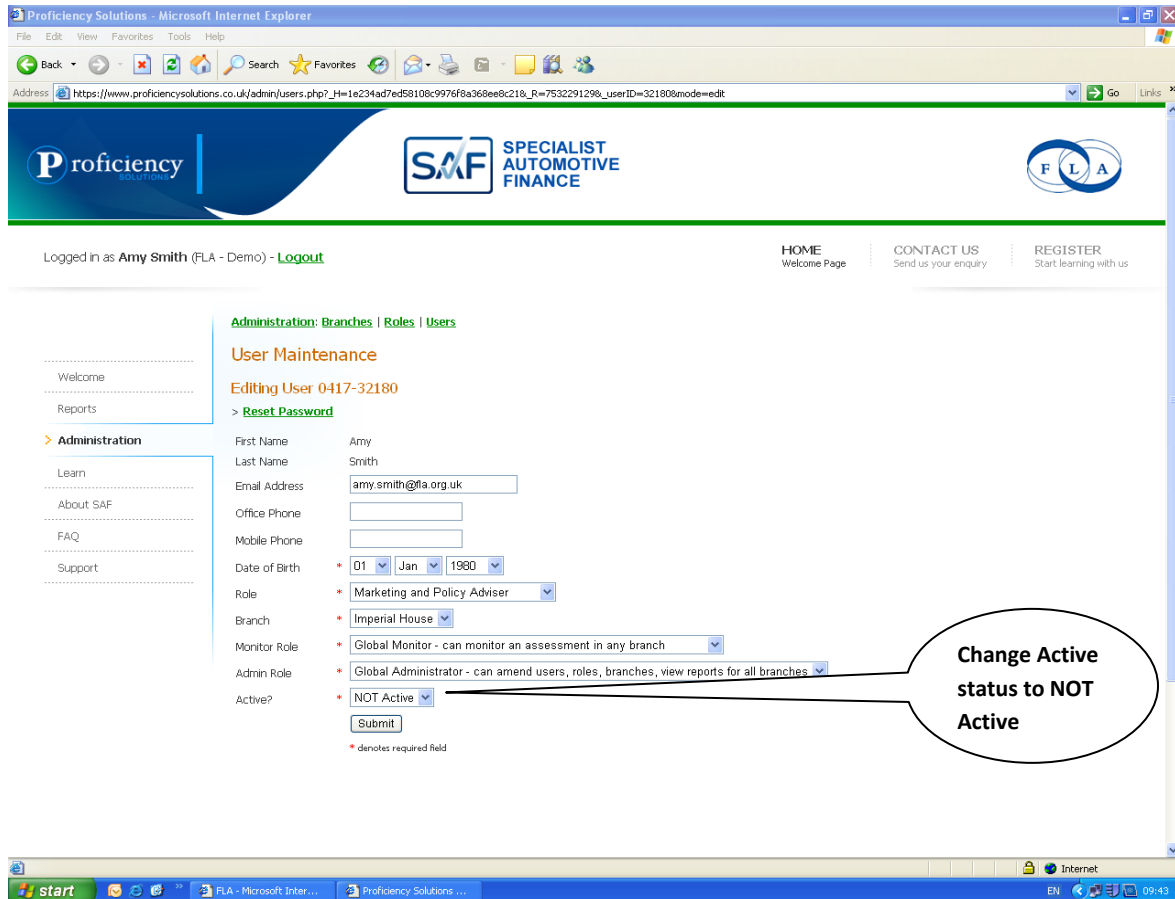


Figure 2: De-registering Individuals

Individuals who have been deactivated will not show on any reports unless “Show All” or “Not Active” has been selected when requesting a report.

Guide to Reports

Reports can only be accessed by Master Administrator or allocated sub-administrator within the group. The system provides the following reports:

User Progress Report

This shows you individual employee's progress. You can use this report to see which of your employees have passed and those that have failed the test. You can also see whose test has expired and is due to be retaken.

Click on the individuals details tab to find out how many tests the individual has taken. Click on each test to see the exact score achieved for that test.

The screenshot shows a web browser window displaying the 'User Progress Report' for Paul Harrison (paul.harrison@fla.org.uk). The page includes a navigation menu on the left with options like 'Administration', 'Learn', and 'Support'. The main content area shows 'Allocated Modules (Master Administrator)' with a table listing one module: 'Specialist Automotive Finance Competence Test' with a status of 'Passed' on 10/07/2008. Below this is a 'Test History' table with columns for Test ID, Date, Time, Status, Score, and Module. The table contains four rows of test results, with the most recent one (184849) showing a 'Passed' status with an 87% score. A callout bubble points to the 'Details' link in the last row of the Test History table, with the text 'Click on details for further information'.

Module ID	Module Name	Status	Date
1009	Specialist Automotive Finance Competence Test	Passed	10/07/2008

Test ID	Date	Time	Status	Score	Module	Details
137441	18/05/2007	20:03:58	Abandoned		Specialist Automotive Finance Competence Test	Details
137764	23/05/2007	13:30:16	Abandoned		Specialist Automotive Finance Competence Test	Details
139154	07/06/2007	11:53:38	Passed-Expired	83%	Specialist Automotive Finance Competence Test	Details
184849	10/07/2008	14:29:32	Passed	87%	Specialist Automotive Finance Competence Test	Details

Figure 3: User Progress Report

Topic Analysis Report

This report allows you to see how well each topic within the test has been tackled by the company as a whole. This helps you to identify how your training programme is working and which sections, if any, need more focus.

Test Activity

Allows you to see each individuals status i.e. passed, failed, abandoned.

Click on the individuals details tab to see full coaching report, this shows you the individuals score and what questions were answered correctly or incorrectly allowing you to develop a personalised training plan.

Topic	Score	Percentage
Motor Finance\Finance Products\Conditional Sale	2/2	100%
Motor Finance\Finance Products\Contract Hire	2/2	100%
Motor Finance\Finance Products\Credit Sale	2/2	100%
Motor Finance\Finance Products\Finance Lease	0/2	0%
Motor Finance\Finance Products\Lease Purchase	0/2	0%
Motor Finance\Finance Products\Mortgage & Secured Loans	2/2	100%
Motor Finance\Finance Products\Fixed Rate of Interest\Definition	2/2	100%
Motor Finance\Finance Products\Hire Purchase\Definition	4/4	100%
Motor Finance\Finance Products\Hire Purchase\Form, Use & Option to Purchase	4/4	100%
Motor Finance\Finance Products\Personal Contract Purchase\Definition	4/4	100%
Motor Finance\Finance Products\Personal Contract Purchase\Form & Use	4/4	100%
Motor Finance\Finance Products\Personal Loan\Definition	3/3	100%
Motor Finance\Finance Products\Personal Loan\Form & Use	3/3	100%
Motor Finance\Finance Products\Variable Rate of Interest\Definition	2/2	100%
Motor Finance\Regulation & Legislation\Compliance	0/1	0%
Motor Finance\Regulation & Legislation\Consumer Credit Act\Pre Contract Information	3/3	100%
Motor Finance\Regulation & Legislation\Consumer Credit Act\Regulated & Non Regulated Agreements	3/3	100%
Motor Finance\Regulation & Legislation\Consumer Credit Act\Trade Premises & Signing Documents	0/3	0%
Motor Finance\Regulation & Legislation\Consumer Credit Act\Who Gets Cover	3/3	100%
Motor Finance\Regulation & Legislation\Data Protection\Security	3/3	100%
Motor Finance\Regulation & Legislation\Data Protection\What it Covers	3/3	100%
Motor Finance\Regulation & Legislation\Data Protection>About the DPA	3/3	100%
Motor Finance\Regulation & Legislation\Distance Selling\Additional Consumer Rights & Danger Areas	1/1	100%
Motor Finance\Regulation & Legislation\Distance Selling\What Constitutes Distance Selling	3/3	100%
Motor Finance\Regulation & Legislation\Money Laundering\Financial Limits	3/3	100%
Motor Finance\Regulation & Legislation\Money Laundering\Responsibilities	0/3	0%
Motor Finance\Regulation & Legislation\Security\Documents	3/3	100%
Motor Finance\Regulation & Legislation\Security\Identification	3/3	100%
Motor Finance\Finance Products\Hire Purchase\General	6/6	100%
Motor Finance\Finance Products\Personal Contract Purchase\General	6/6	100%
Motor Finance\Finance Products\Personal Loan\General	4/4	100%
Motor Finance\Regulation & Legislation\Consumer Credit Act\General	6/8	75%
Total	87/100	87%

33 rows displayed

[Test Details](#)

Figure 4: Test Activity Report

Test Status Report

Gives you the date of when each individuals test expires. Click on the individuals name for a full test history.

Export data

Allows you to export your data to an Excel spreadsheet. You can then forward the data to your training manager and relevant individuals within your company.

Useful test features

How to: Access individuals test results:

Under reports section, open the progress report

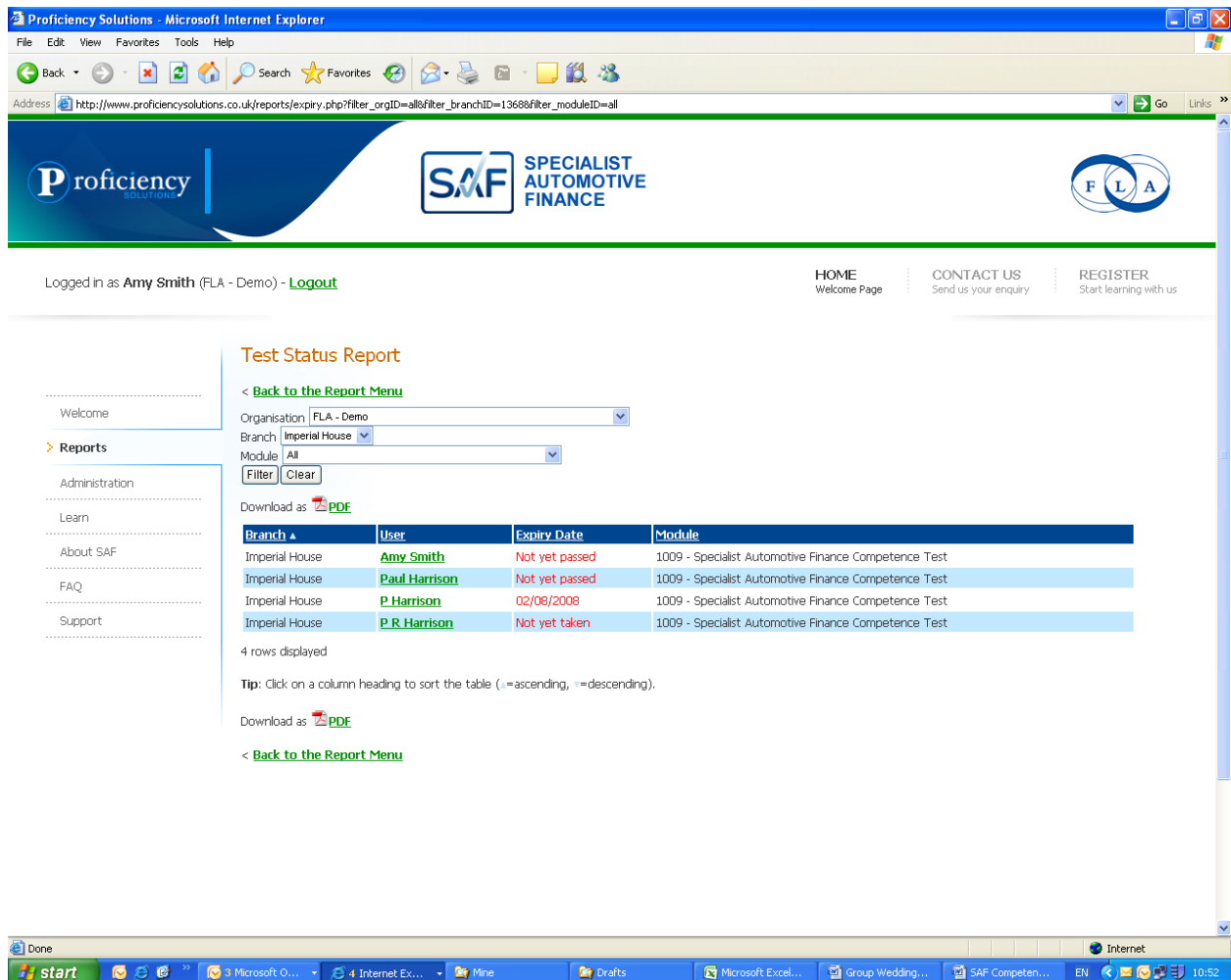
Click on the individual's details link

Under test history click on details of most current test date to see a report of percentage of pass / fail and also how well each individual topic within the test was tackled.

How to: Find out who has taken the test/whose test has expired:

Under reports section, open the test status report,

From here you can click on the individual's details to see if they have attempted the test and what areas they may need additional training on.



Proficiency Solutions - Microsoft Internet Explorer

Address: http://www.proficiencysolutions.co.uk/reports/expiry.php?filter_orgID=all&filter_branchID=1368&filter_moduleID=all

Logged in as **Amy Smith** (FLA - Demo) - [Logout](#)

HOME Welcome Page | CONTACT US Send us your enquiry | REGISTER Start learning with us

Test Status Report

< [Back to the Report Menu](#)

Organisation: FLA - Demo
Branch: Imperial House
Module: All
[Filter](#) [Clear](#)

Download as [PDF](#)

Branch	User	Expiry Date	Module
Imperial House	Amy Smith	Not yet passed	1009 - Specialist Automotive Finance Competence Test
Imperial House	Paul Harrison	Not yet passed	1009 - Specialist Automotive Finance Competence Test
Imperial House	P. Harrison	02/08/2008	1009 - Specialist Automotive Finance Competence Test
Imperial House	P.R. Harrison	Not yet taken	1009 - Specialist Automotive Finance Competence Test

4 rows displayed

Tip: Click on a column heading to sort the table (↑=ascending, ↓=descending).

Download as [PDF](#)

< [Back to the Report Menu](#)

Figure 5: Test Status Report

How to: Identify the training requirements of your company:

Under the reports section, open the topic analysis report.

Areas on this report that are highlighted in red indicate a sever lack of knowledge and require further training.

Specialist Automotive Finance Competence Test
Number of tests passed : 2

Topic	Average Percentage
Finance Products - Conditional Sale	0%
Finance Products - Contract Hire	100%
Finance Products - Credit Sale	100%
Finance Products - Finance Lease	50%
Finance Products - Lease Purchase	50%
Finance Products - Mortgage & Secured Loans	100%
Finance Products - Fixed Rate of Interest - Definition	100%
Finance Products - Hire Purchase - Definition	100%
Finance Products - Hire Purchase - Form, Use & Option to Purchase	100%
Finance Products - Personal Contract Purchase - Definition	50%
Finance Products - Personal Contract Purchase - Form & Use	100%
Finance Products - Personal Loan - Definition	100%
Finance Products - Personal Loan - Form & Use	50%
Finance Products - Variable Rate of Interest - Definition	100%
Regulation & Legislation - Compliance	100%
Regulation & Legislation - Consumer Credit Act - Pre Contract Information	100%
Regulation & Legislation - Consumer Credit Act - Regulated & Non Regulated Agreements	50%
Regulation & Legislation - Consumer Credit Act - Trade Premises & Signing Documents	100%
Regulation & Legislation - Consumer Credit Act - Who Gets Cover	100%
Regulation & Legislation - Data Protection - Security	100%
Regulation & Legislation - Data Protection - What it Covers	100%
Regulation & Legislation - Data Protection - About the DPA	50%
Regulation & Legislation - Distance Selling - Additional Consumer Rights & Danger Areas	50%
Regulation & Legislation - Distance Selling - What Constitutes Distance Selling	50%
Regulation & Legislation - Money Laundering - Financial Limits	100%
Regulation & Legislation - Money Laundering - Responsibilities	100%
Regulation & Legislation - Security - Documents	100%
Regulation & Legislation - Security - Identification	100%
Finance Products - Hire Purchase - General	100%
Finance Products - Personal Contract Purchase - General	83%
Finance Products - Personal Loan - General	100%
Regulation & Legislation - Consumer Credit Act - General	88%
Total Average Percentage	83%

View in PDF

Figure 6: Topic Analysis Report

Support for users

Users should contact their company Master Administrator with queries in the first instance. If the Master Administrator cannot help, or you are the Master Administrator and need further assistance select one of the following contact methods:

If your enquiry relates to **maintenance and user accessibility** of the competence test site contact proficiency solutions: 0870 122 2193 or info@proficiencysolutions.co.uk

For **more information** on SAF go to www.specialsitautomotivefinance.org.uk

If you have a **general enquiry** about SAF or the above contact details are inappropriate for your question, contact Amy Evans at the FLA on: saf@fla.org.uk, 020 7420 9613