User Guide

This user guide provides support and guidance for authorised users of the Energy & Utility Skills Register (EUSR) online registration system, QuartzWeb.

Note: There are instructional videos on our website that cover a number of specific activities.

To access QuartzWeb, please visit quartzweb.eusr.co.uk

Your feedback on this user guide is welcomed and we would encourage you to let us know if there are other topics or activities you would like us to include. Email us at eusr@euskills.co.uk.

User Guide: QuartzWeb - EUSR's registration system

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First-time User

If you already had login access on EUSR's old system, you will already have an EUSR ID Number and this will be carried across into QuartzWeb. You will be prompted to create a new password when logging into QuartzWeb for the first time.

If you do not have a login, your Lead Administrator will be able to add you onto the system as an Administrator.

A Lead Administrator and an Administrator can allocate some other roles within their organisation.

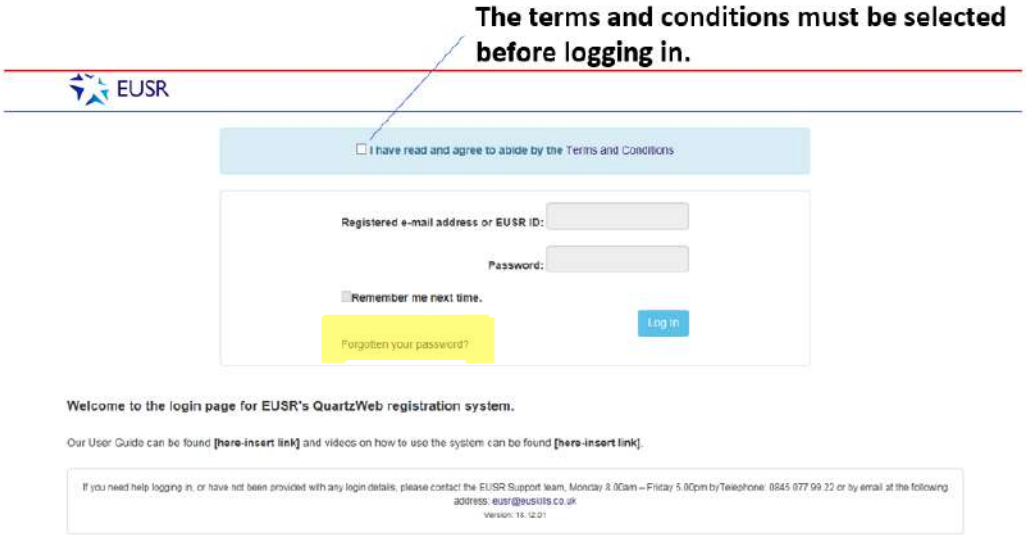
Only EUSR Support can allocate the roles of Lead Administrator, Approved Trainer (for SHEA, NWH and SCO) and Approved Assessor (for BESC:AME).

If you are a new centre and no-one in your organisation has access to QuartzWeb, the individual who signs agreements with us, the Nominated Contact or Head of Centre, must email EUSR Support with the name, job title and email address of the individual(s) who will be the Lead Administrator for your organisation. Once allocated by EUSR Support, the Lead Administrator will be able to add other authorised users onto the system in the relevant roles. Please see **Appendix 2** Different User Roles.

NOTE: Authorised users of QuartzWeb can have multiple roles assigned. Make sure you are logged in using the correct role as each role allows different functionality.

Logging into QuartzWeb

Each time you login you will be required to confirm that you will comply with the Terms and Conditions of Use – attached as **APPENDIX 1** in this user guide.



Login Credentials

To login you will require an EUSR ID number or the email address registered against the ID number. The ID number is no longer than six digits long.

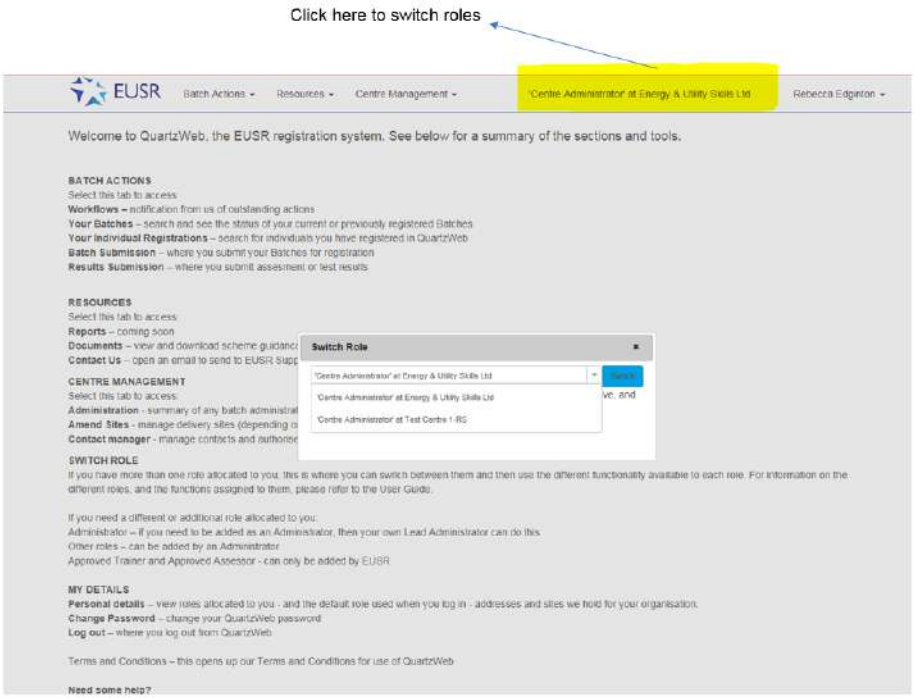
Forgotten your Password?

If you have forgotten your Password, then select the 'Forgotten your password' link on the QuartzWeb welcome page and you will be taken to the reset password page. Enter your QuartzWeb username and click 'Submit'. An email containing a new password will be emailed to you. If you still have difficulty logging in, please contact EUSR Support.

Switching Roles

If you have more than one role – because you need to perform different functions in QuartzWeb - you will need to switch from one role to another. If one of your roles is not listed once you have logged in, please contact EUSR Support.

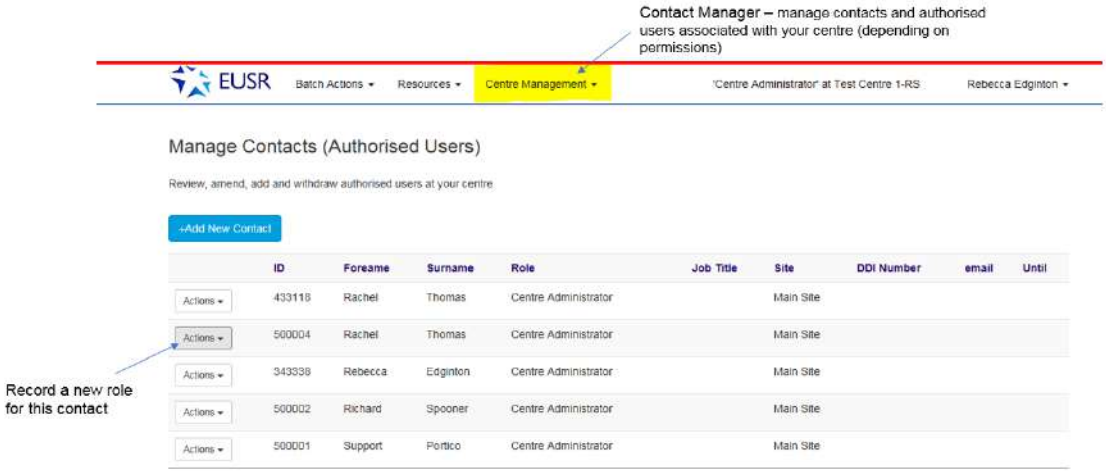
Once logged in, click on the main tab which details the role you are currently logged in as. A 'Switch Role' dropdown menu will appear. Select the correct role and click on the 'Switch Role' button.



Change in Status

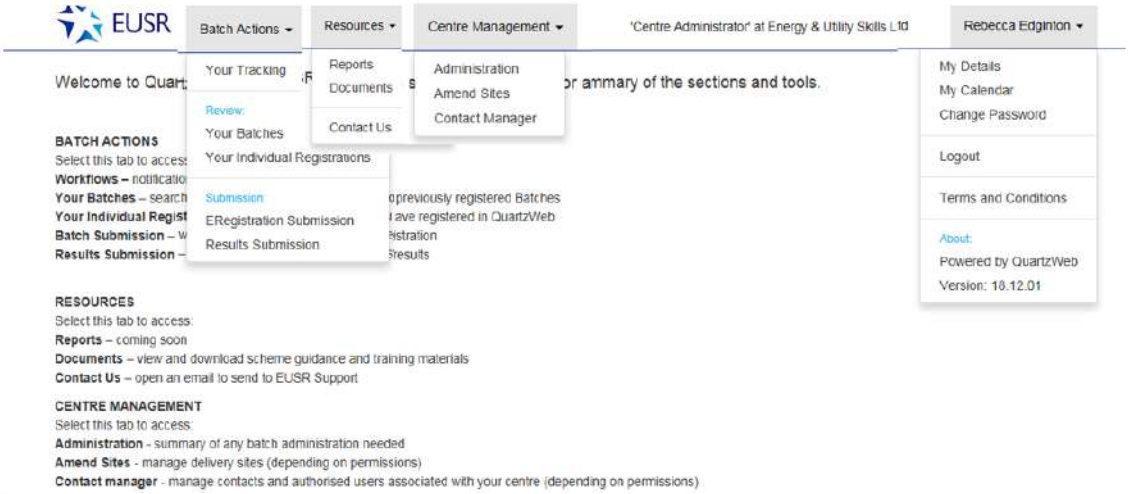
When someone moves role, or leaves your organisation, you will need to amend or remove their access to QuartzWeb.

This is done in the Centre Management tab, selecting Contact Manager.



Main Menus

It's easy to navigate between the various functions within QuartzWeb. Select the main tab and there are additional dropdown menus.



The available options in each menu are shown below with more detail within this user guide.

Batch Actions

Select this tab to access:

Workflows – notification from us of outstanding actions

Your Batches – search and see the status of your current or previously registered Batches

Your Individual Registrations – search for individuals you have registered in QuartzWeb

Batch Submission – where you submit your Batches for registration, or to Book a Course (SHEA, NWH and SCO only)

Results Submission – where you submit assessment or test results

Resources

Select this tab to access:

Reports – coming soon

Documents – view and download scheme guidance and training materials

Contact Us – opens an email to send to EUSR Support

Centre Management

Select this tab to access:

Administration - summary of any batch administration needed

Amend Sites - manage delivery sites (depending on permissions)

Contact manager - manage contacts and authorised users associated with your centre (depending on permissions)

Switch Role

If you have more than one role allocated to you, this is where you can switch between them and then use the different functionality available to each role.

For information on the different roles, and the functions assigned to them, please refer to Appendix 2 Different User Roles.

If you need a different or additional role allocated to you:

Administrator – if you need to be added as an Administrator, then your own Lead Administrator can do this

Other roles – can be added by an Administrator

Approved Trainer and Approved Assessor - can only be added by EUSR Support

My Details

Personal details – view the roles you are allocated, the default role assigned to you when you log in and addresses and sites we hold for your organisation.

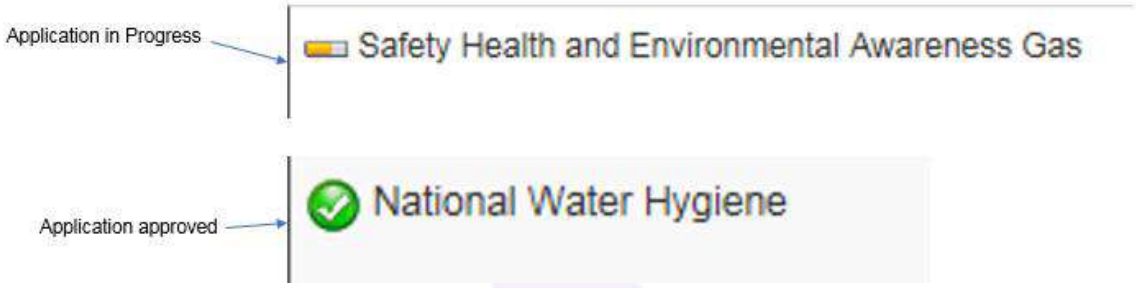
Change Password – change your password used to log in to QuartzWeb

Log out – where you log out from QuartzWeb

Terms and Conditions – this opens up the Terms & Conditions for Use of QuartzWeb

Progress Key

Once an application is submitted you are able to identify and individuals progress.



Scheme Listing

Registrations for the following schemes must be made in QuartzWeb:

Passport Schemes	Skills-based Schemes	Bespoke Programmes	Endorsed Training Programmes
All Safety, Health and Environmental Awareness (SHEA) schemes – Core, Cross-Country Pipelines, Gas, Power, Telecommunications, Water, Waste and Resource Management, SWITCH National Water Hygiene Safe Control of Operations (GB) Basic Electrical Safety Competence for Access, Movement and Egress (BESC:AME)	Licence to Control (L2C) Plant and Utility Scheme (PLUS) Power Skills Scheme (Competency Accord) Smart Metering Utility Excavations	National Grid Electricity Contractors National Grid Direct Labour Scheme Cadent CAP ELR Scheme Safe Control of Operations (NI) Scottish Water Domestic Operation and Maintenance Strategy (DOMS)	All Endorsed Training Programmes

The following schemes remain paper-based:

Leakage Detection & Control (Water)

In-situ Lining

Confined Spaces

Confined Spaces (Water)

Safe Control of Mains Connections (SCMC)

Utility Network Construction Supervisor

Network Construction Operations (NCO) (Gas)

Network Construction Operations (NCO) (Water)

Registration forms, photographs and scheme evidence for these schemes to be submitted by post to:

EUSR Support, Friars Gate, 1011 Stratford Road, Shirley, Solihull, B90 4BN

Registration Forms are available on the relevant scheme page on the EUSR website.

Replacement Cards

These will continue to be paper-based and a Replacement Card Request Form must be completed and submitted. Full details available on our website:

www.eusr.co.uk/support-faqs/cardholder-support/replacement-cards

ERegistration Submission

Whether it is just one individual or twelve, all registration submissions are referred to as a 'Batch'. (**Note:** the first part of this process is also how you book a course for SHEA, NWH and SCO only).

Mandatory Information for each individual within the Batch:

You must provide:

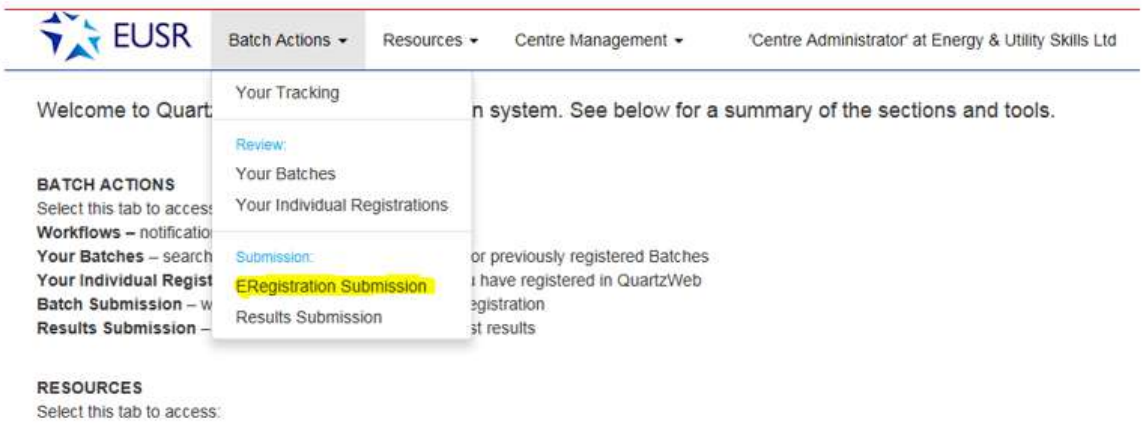
- First Name
- Last Name
- Date of Birth
- Email address (personal or work)
- Employer name for Smart Metering
  NOTE: Employer name is not currently mandatory for most schemes though it is highly recommended that this information is recorded against all individuals.

Booking a Course

(SHEA, NWH, SCO AND Scottish Water DOMS only)

You are able to plan ahead and book a course – **but no more than 28 days in advance**. A course is created when you create a Batch registration. See section on ERegistration Submission.

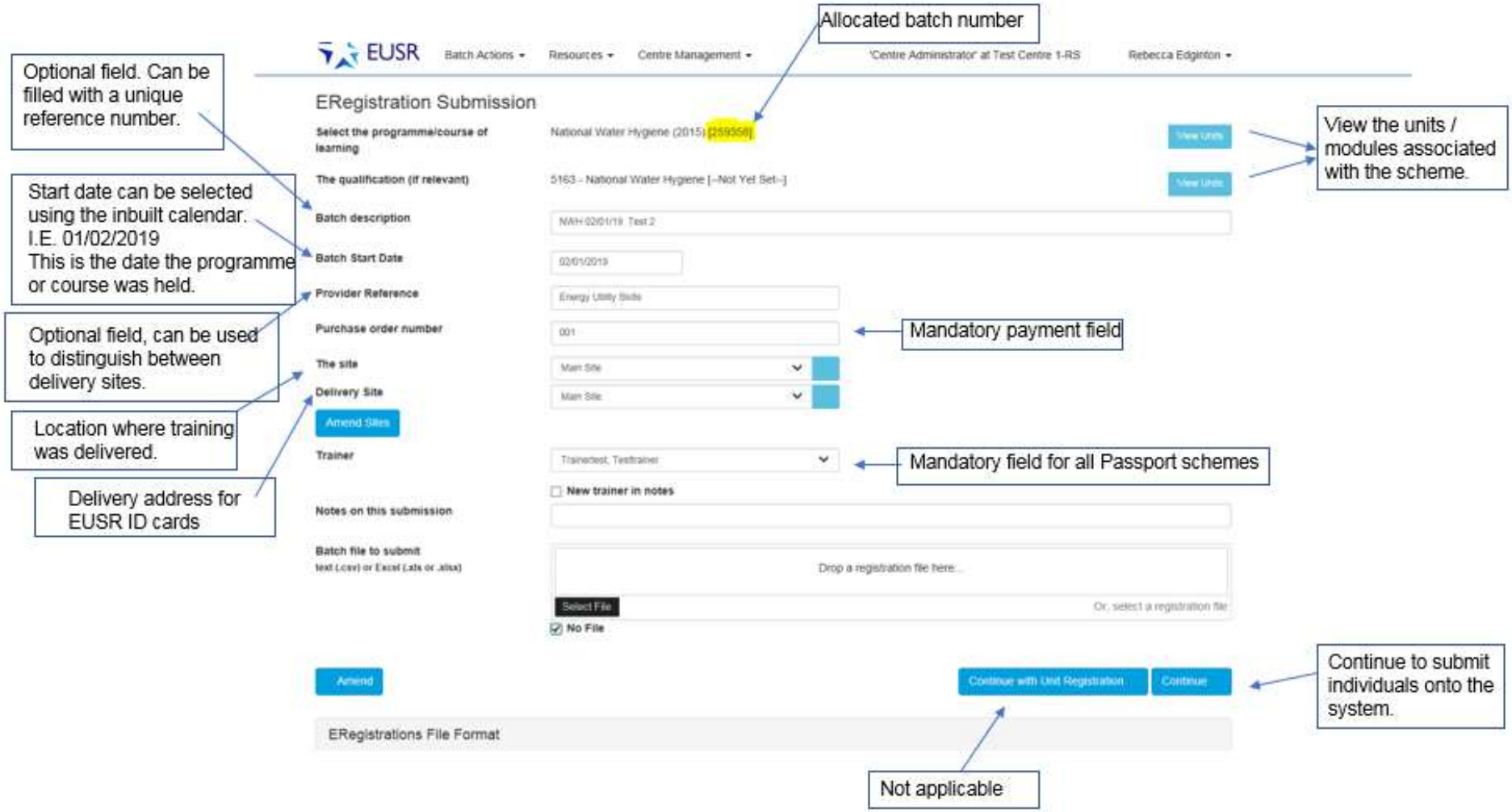
Creating a Batch



You will be asked to select the Programme / Course of learning from a drop down box.

The second drop down box is the Unit / Scheme you wish you deliver.
For example:

- Utility Excavations
- Unit 1 – Locate Utility Services



EUSR Support: Monday to Friday 8am–5pm | eusr@euskills.co.uk | 0845 077 99 22

Purchase Order Number

This is a mandatory field. The Purchase Order number you provide will appear in invoicing documentation.

If you do not wish to pay by Purchase Order you have other options:

- BACS – if this is used please input, for example, 'Paid by BACS on 14/12/18'
- Credit/Debit Card - if this is used please input, for example, 'Paid by CARD on 14/12/18. **Note:** to pay by Card you will need to pay by telephone – EUSR Support – 0845 077 99 22

Please note that we will invoice the centre (or the approved provider or trainer) that has made the registration in QuartzWeb. **We will not invoice third parties.**

Trainer

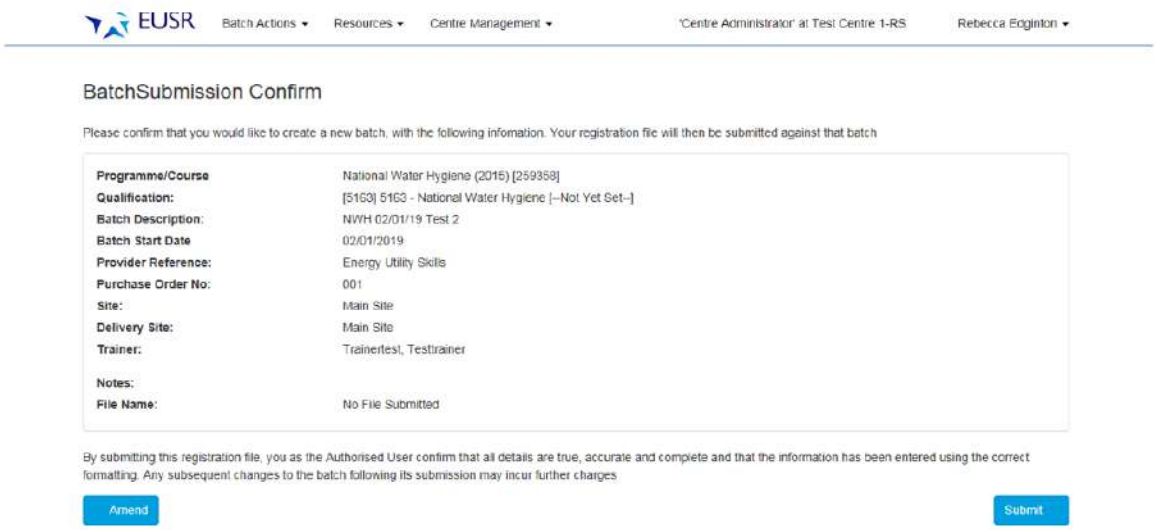
This is a mandatory field for SHEA, NWH, SCO, BESC:AME and Scottish Water DOMS. The names of your Approved Trainers (or Approved Assessors for BESC:AME) for these schemes will appear in the drop down box. Please select the appropriate Approved Trainer (or Assessor for BESC:AME) name.

If a Trainer (or Assessor) name is missing, please contact EUSR Support on email: eusr@euskills.co.uk or telephone: 0845 077 99 22.

New Trainer in Notes – this is an optional field and free flow text can be added as a note on this Batch.

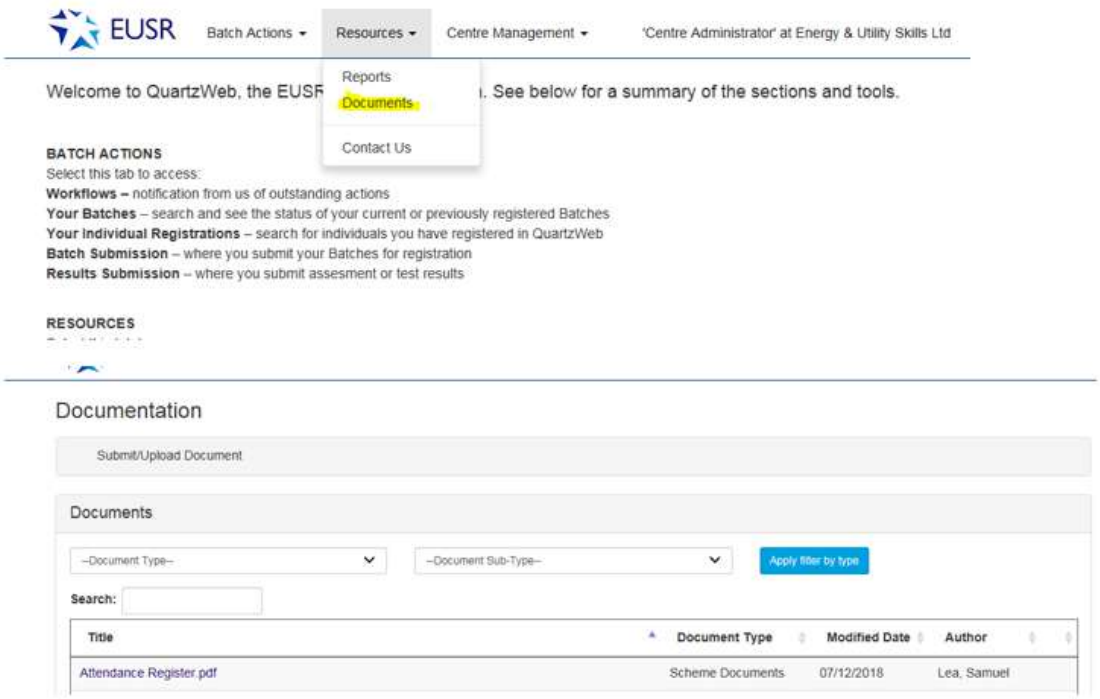
Batch Submission Confirmation

You will taken to a summary page – please take the opportunity to review the information to ensure it is correct. If you would like to amend the information, select the Blue 'Amend' button and this will take you back to the previous screen.



If the information is all correct, select Submit and an EUSR Batch number will be created. The batch can be amended at a later date by selecting 'Batch Actions' and 'Your Batches'.

For SHEA, NWH, SCO only – once a Batch has been created, a test paper will be generated for download in the Resource tab. The test paper is available 48 hours before the course date.

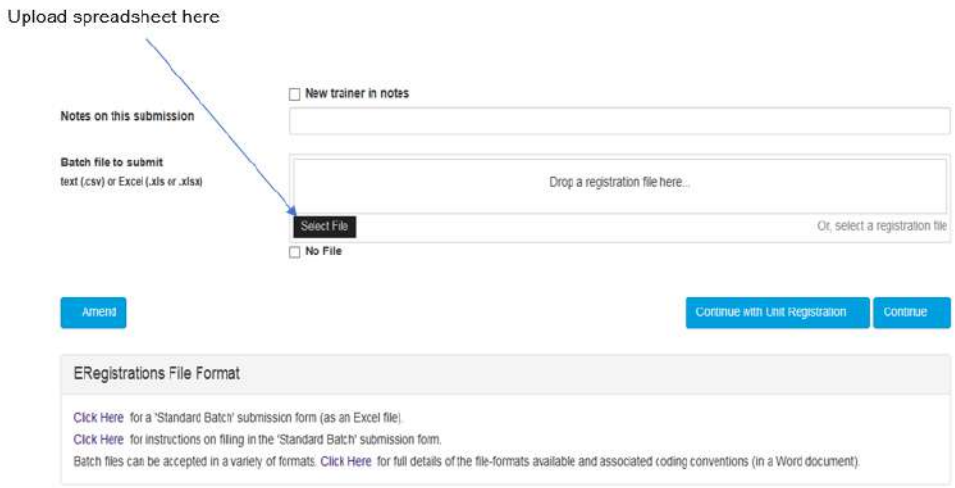


Adding Individuals to a Batch

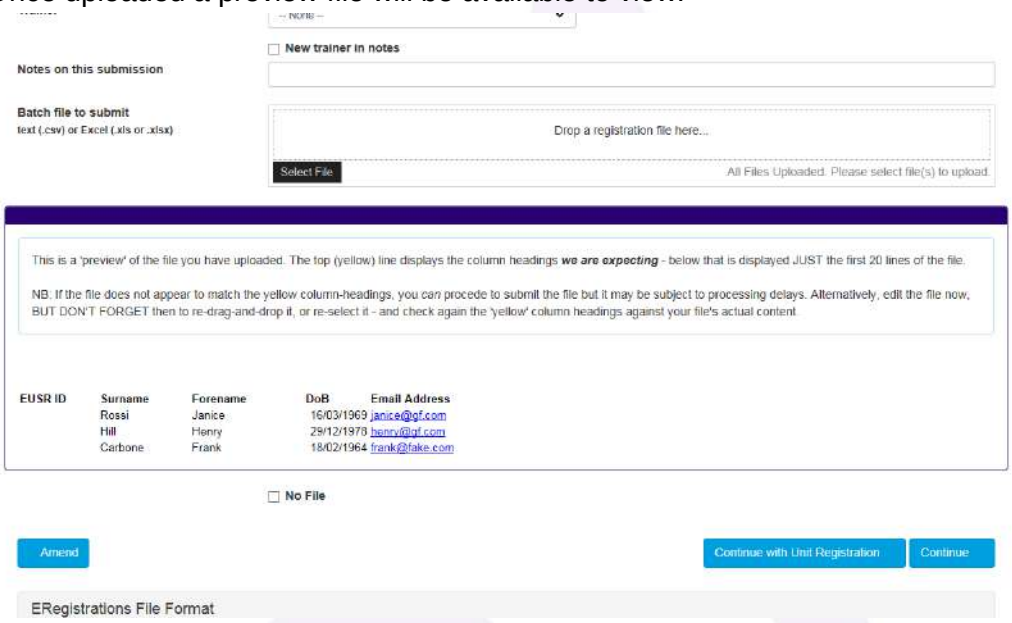
Individuals can be added in bulk using the Batch File, or on an individual by individual basis.

Bulk Registration

To submit multi-registrations in the same Batch use the 'Batch File' – this is found by selecting the link at the foot of the first Batch Submission screen.



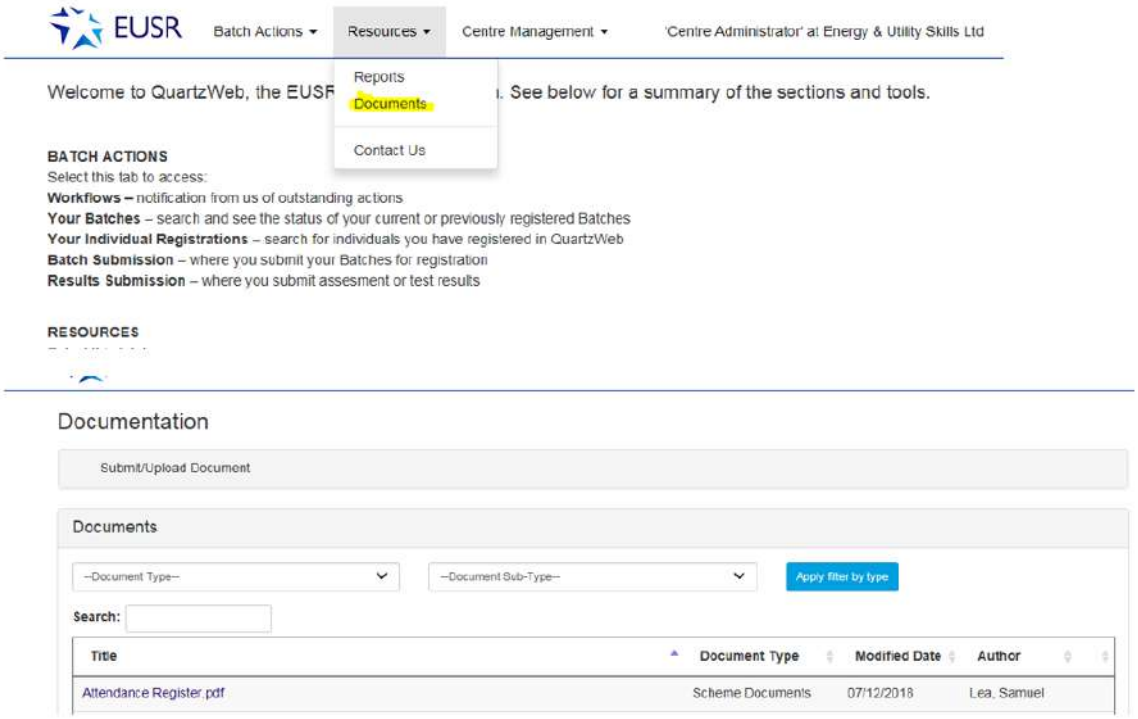
Once uploaded a preview file will be available to view.



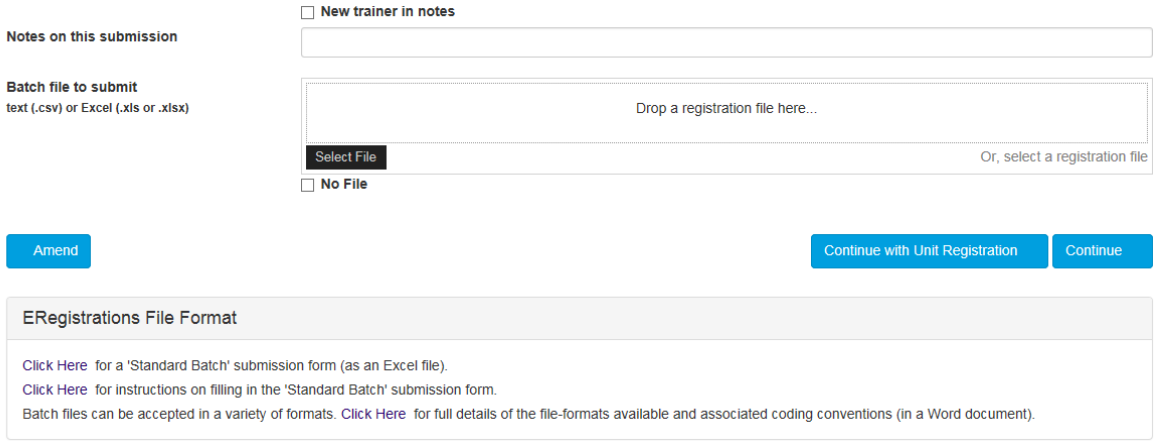
Once uploaded and correct. Click continue to confirm.

A blank template for the bulk upload can be found under the 'Documents' tab or can be located at the bottom of the ERegistration Submission page.

1. Locate spreadsheet through document.

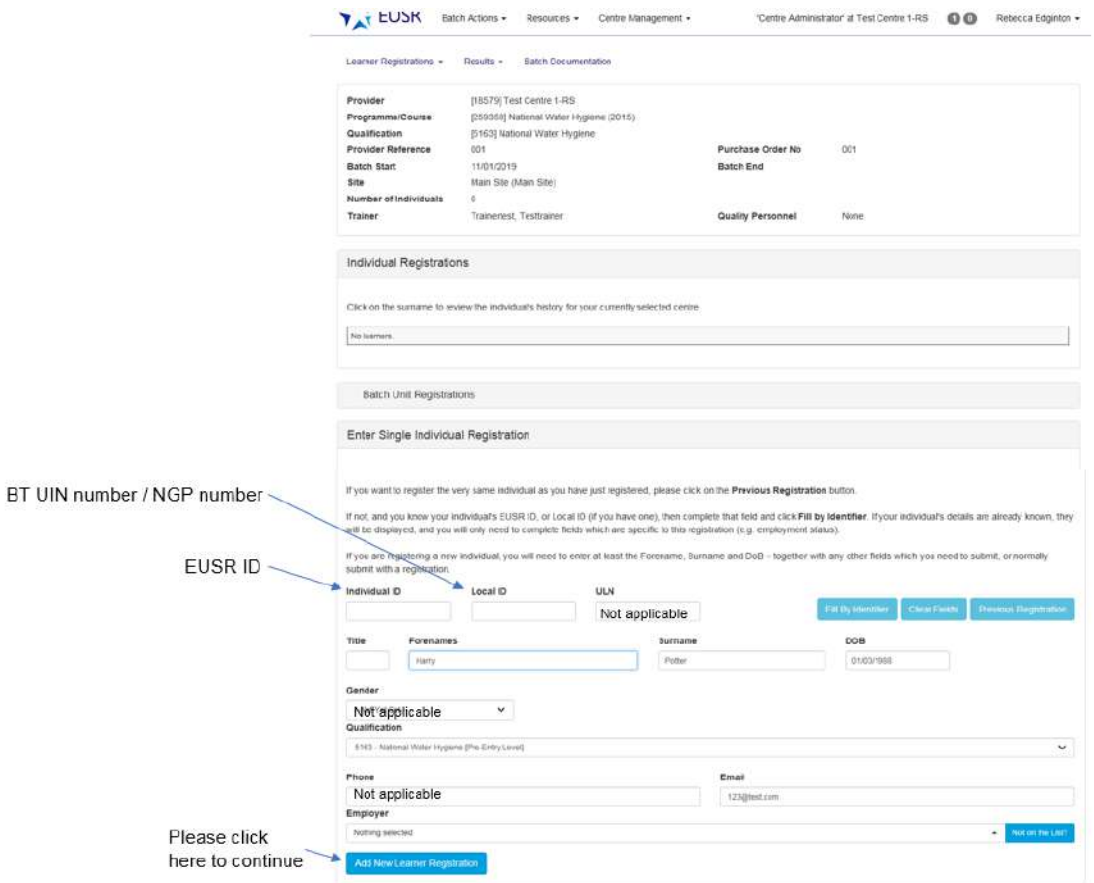


2.Locate spreadsheet through submission page.



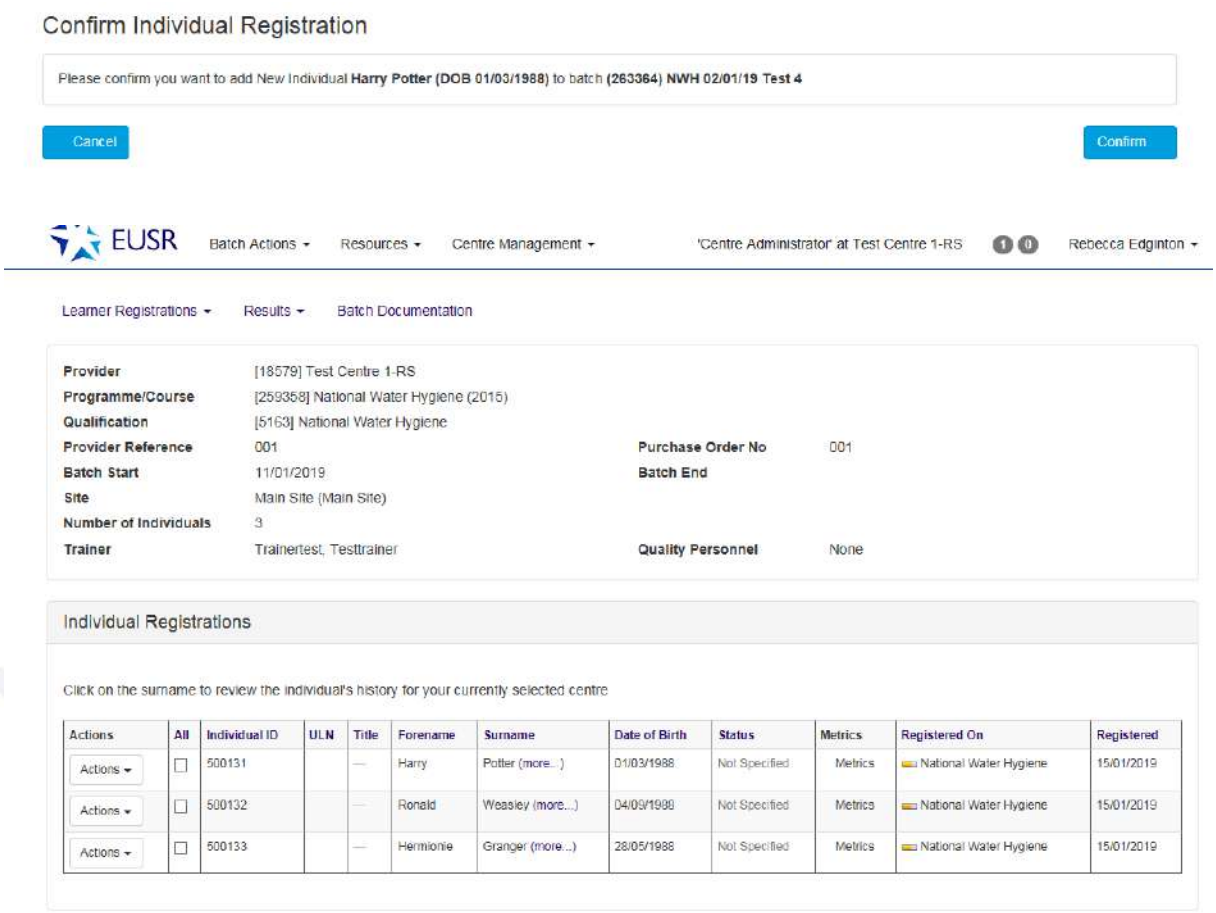
Adding individually

Individuals will appear in the ‘Individual Registrations’ section.



If the EUSR ID number is known, please fill in the ‘Individual ID’ and select ‘Fill By Identifier’ - this will complete all other fields on screen.

You will need to confirm or amend the registration.



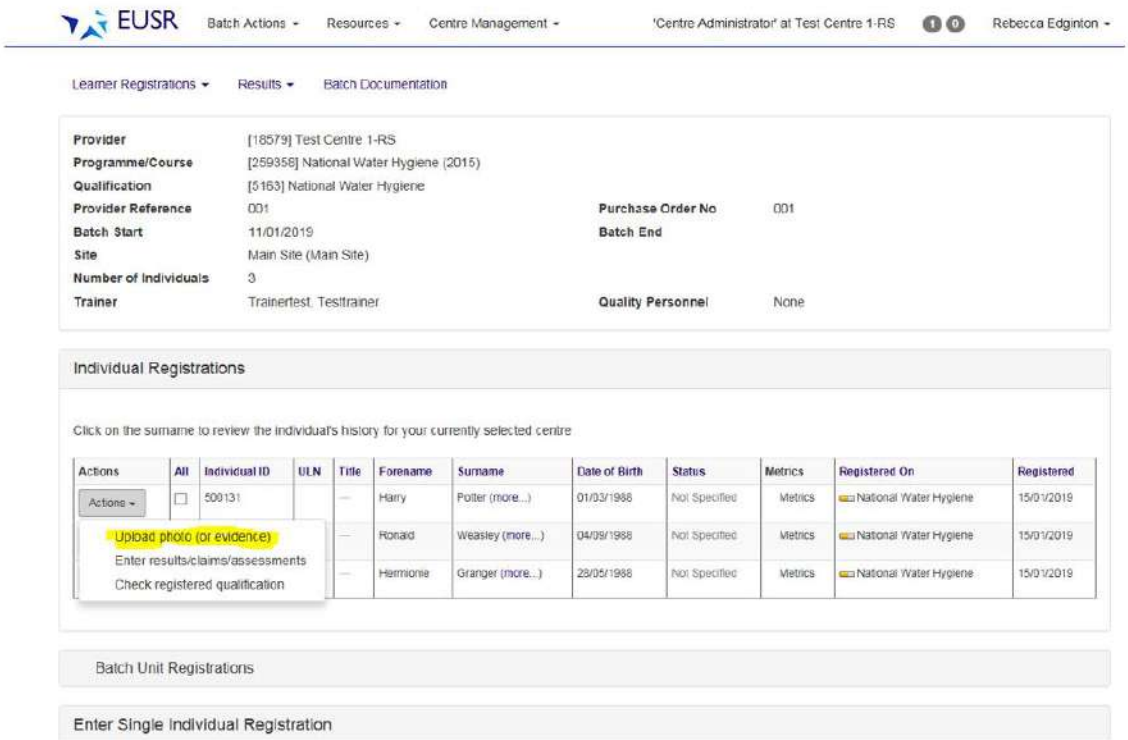
Once uploaded all individuals will appear on the batch. Individuals can be reviewed by clicking against their names.

Uploading photographs and scheme evidence

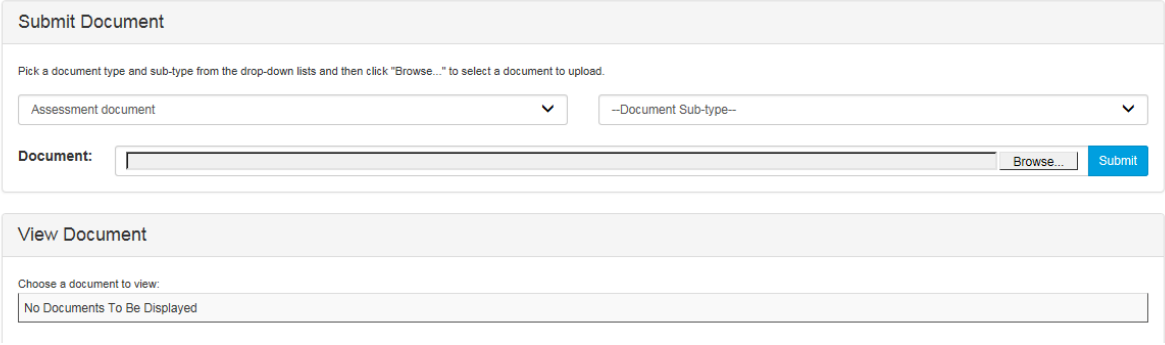
Before a registration is 'live' on EUSR, a photograph, and scheme evidence is a requirement of the scheme, this must be uploaded against the individual. Please ensure that the photographs you upload comply with our Photograph Guidelines www.eusr.co.uk/support-faqs/provider-and-trainer-support/photograph-guidelines

'example photo'

In the Left hand side of the 'Individual Registrations' select 'Actions' and then 'Upload Photo and/or evidence'.



Select the type of document you wish to upload and click ‘Submit’



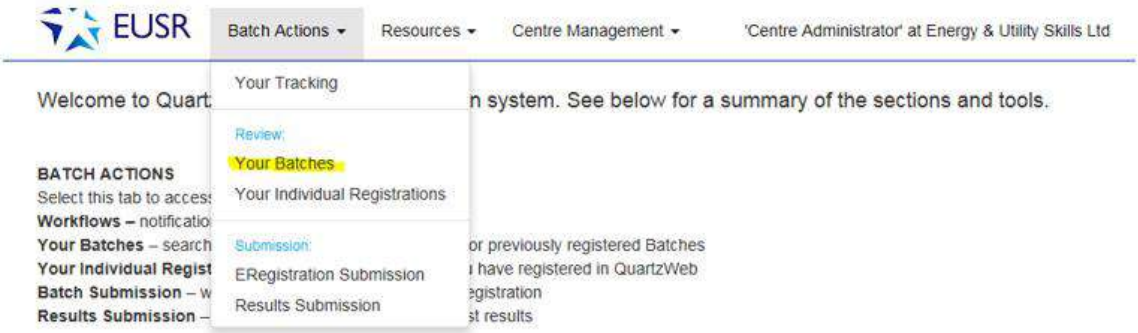
Photos can be uploaded in Jpeg or PNG format.

If an individual has an existing ID number and photo, another photo will not need to be uploaded.

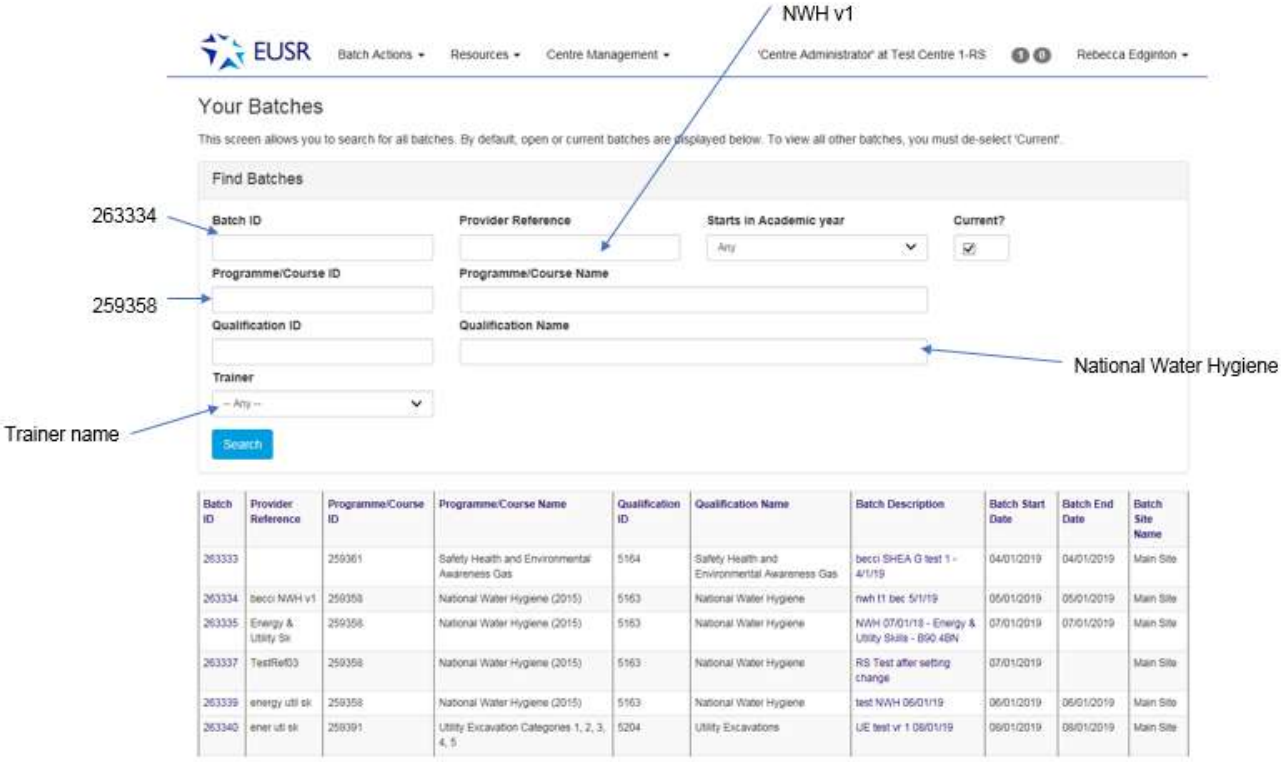
Evidence varies depending on the scheme. Please see scheme rules for evidence requirements.

Viewing your Batches

You can view your incomplete Batches (ie those that have not yet been submitted) and all previously submitted Batches by selecting the main tab, ‘Batch Actions’ and then under ‘Review’ selecting ‘Your Batches’.



Batches can be searched for by completing the ‘Find’ fields.

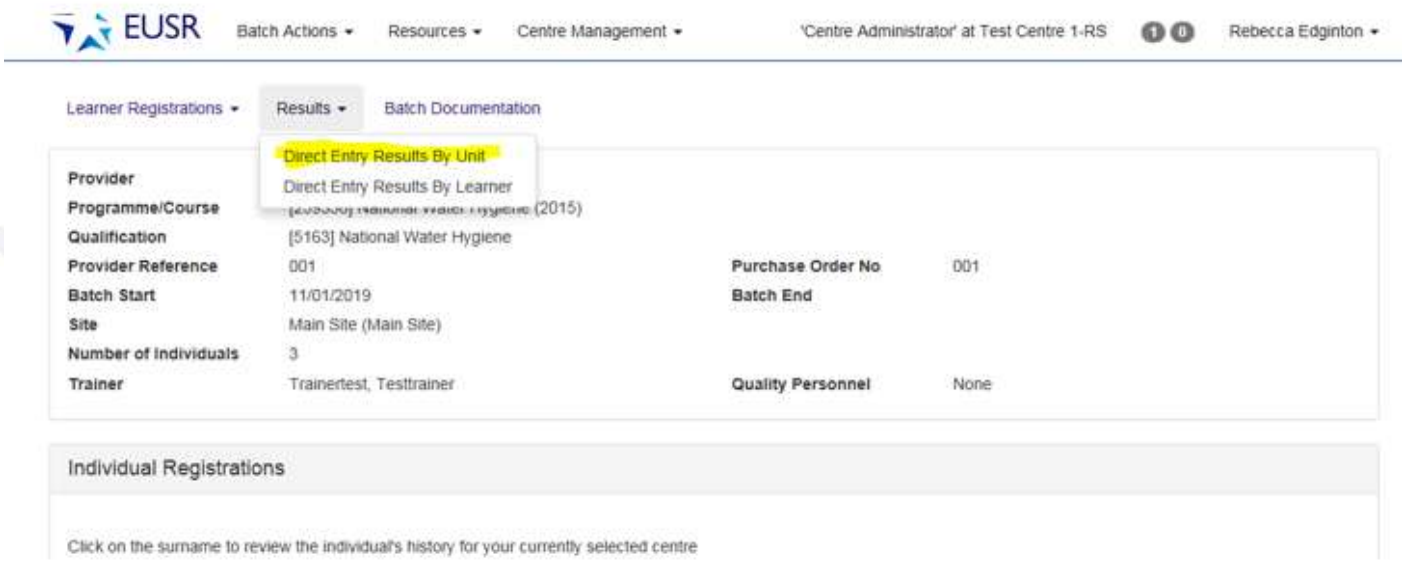


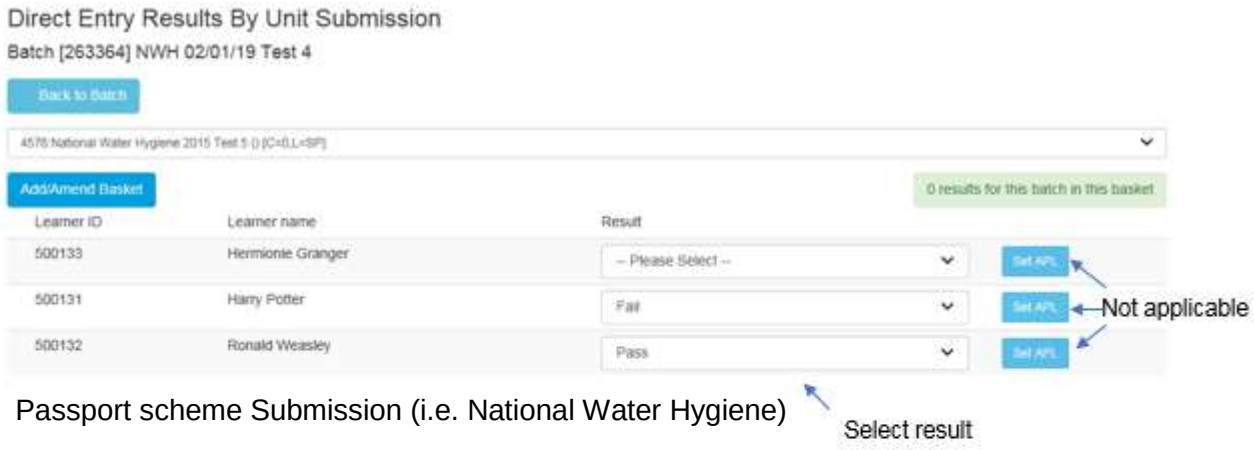
Adding a Test or Assessment Result

(For SHEA, NWH, SCO and Scottish Water DOMS only)

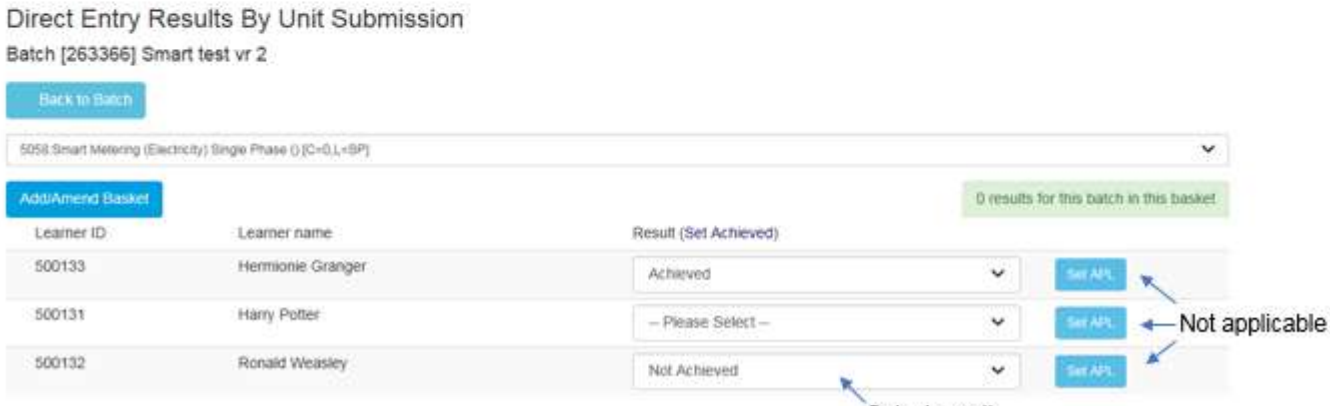
For these schemes you will need to record whether an individual has passed their assessment (or test) before their registration can go 'live'. Pass or Fail can be recorded by either selecting 'By Unit' or 'Learner'.

By Unit



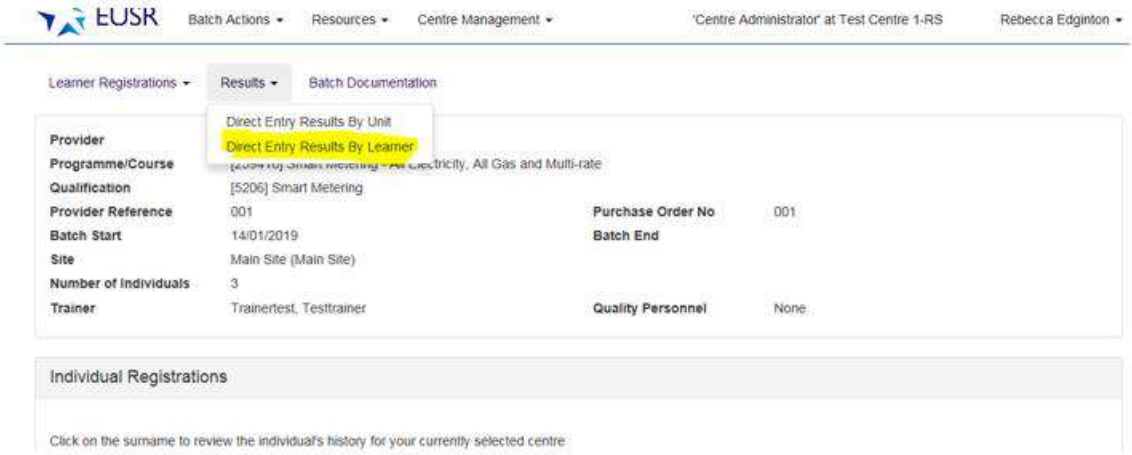


Passport scheme Submission (i.e. National Water Hygiene)

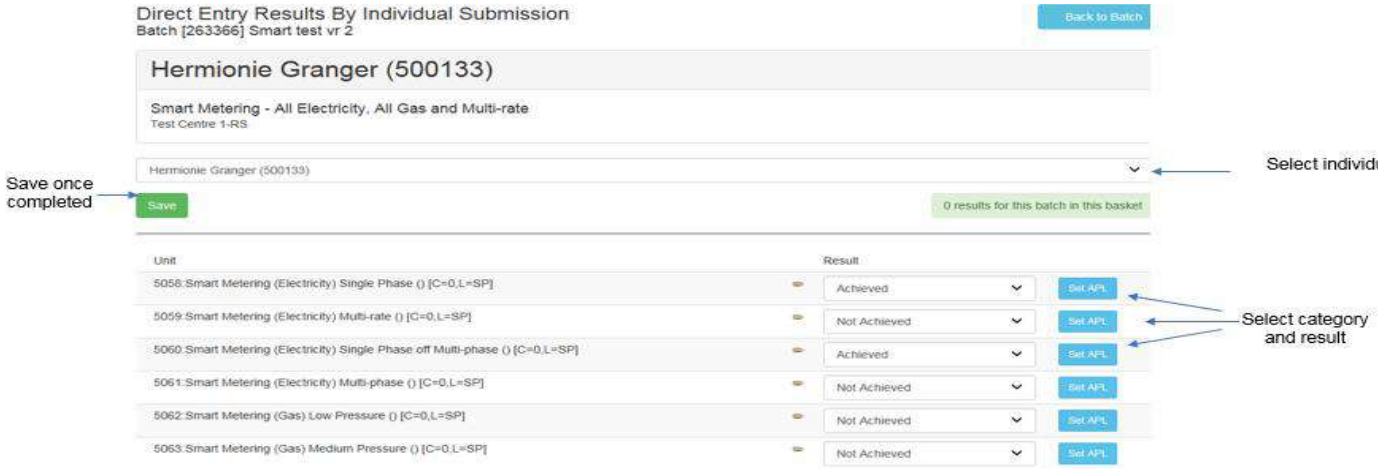


Skills based scheme Submission (i.e. Utility Excavations)

By Learner

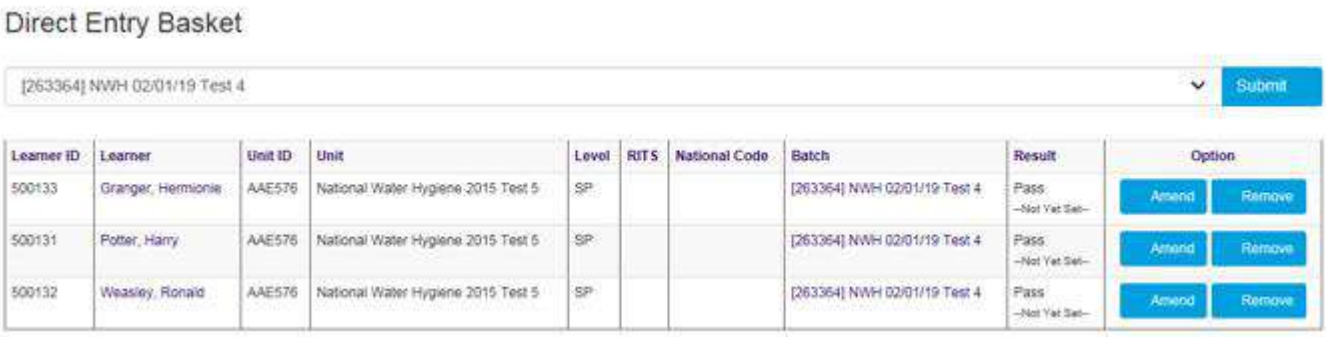


For these schemes you will need to record whether an individual has passed their assessment (or test) before their registration can go 'live'. Achieved or Not Achieved can be recorded by either selecting 'By Unit' or 'Learner'.



Once all individuals are uploaded to the 'Results' tab. they will be uploaded to the basket. Select 'Basket', and then select the batch you wish to submit.

Select the batch and individuals you want to submit. Amend or remove any individuals who are not required and submit.



Confirm or amend Results Submission

Once a batch is submitted a confirmation page will appear.

The batch will now be sent across to EUSR to verify.

Please click the EUSR tab in the top left-hand corner to return to the home screen.

Registration Deadlines

All Batches must be submitted for Registration no later than 28 days after training delivery or assessment.

Downloading Scheme or Programme Materials

Scheme or Programme Materials can be accessed in the 'Resources' tab for all schemes or programmes you are approved to deliver. Some schemes or programmes will not have any associated materials.

Question Papers and Answer Sheets (SHEA, NWH and SCO only)

You will always need to book a course for SHEA, NWH and SCO so that you can download question papers. Question Papers are allocated 48 hours prior to the course date. Question Papers can be downloaded on demand ie you do not have to download them in advance of you requiring them – subject to your QuartzWeb accessibility.

Approved Trainers (for SHEA, NWH and SCO only), Lead Administrator and Administrators can download scheme materials. CBL Administrators can download some scheme materials.

Appendix 1 – QuartzWeb Terms and Conditions

Terms and Conditions for Use of QuartzWeb

These terms and conditions (T&Cs) relate to the use of QuartzWeb, Energy & Utility Skills' online registration system by staff within our approved centres - including approved providers and our approved trainers and assessors (approved users).

Authorised users must confirm their acceptance of these T&Cs each time they log into QuartzWeb. If users do not agree with these T&Cs, they cannot use QuartzWeb.

1. **Use of QuartzWeb**
   1.1. Energy & Utility Skills will make QuartzWeb available for administration related to, and associated with, the registration of individuals on EUSR.
   1.2. Authorised users will be assigned a user name and password which will give them access to QuartzWeb.

2. **Approved providers must:**
   2.1. Ensure that their authorised users are those with responsibility for administration related to EUSR registration.
   2.2. Inform Energy & Utility Skills if an authorised user ceases to be employed or moves job role.

3. **Authorised users must:**
   3.1. Ensure their username and password details are kept secure at all times.
   3.2. Never disclose their login details to any other individual or third party.
   3.3. Never knowingly allow any other individual or third party to use their login details to gain access to QuartzWeb.
   3.4. Always log off QuartzWeb immediately at the end of every session.
   3.5. Not leave any IT equipment unattended when logged into QuartzWeb.
   3.6. Notify Energy & Utility Skills immediately if their login details are lost, disclosed or used by another individual or third party.
   3.7. Ensure that all administration relating to EUSR registration is accurate and in line with the User Guide.

4. **Energy & Utility Skills will:**
   4.1. Make a User Guide available to authorised users to support use of QuartzWeb.
   4.2. Make QuartzWeb available 24 hours a day.
   4.3. Mitigate time periods where QuartzWeb is not available due to routine maintenance.
   4.4. Make an alternative process available for the administration of EUSR registration in the event of a prolonged loss of use of QuartzWeb.

5. **Liability:**
   5.1. Energy & Utility Skills will not be liable for any loss or damage resulting from data that has not been entered or processed in accordance with the User Guide or has been entered incorrectly.

6. **Termination of access**
   6.1. Access to QuartzWeb will be terminated by Energy & Utility Skills in the following circumstances:
      6.1.1. Authorised user ceases to be employed or moves job role.
      6.1.2. Authorised user has not accessed QuartzWeb for a period of 12 months.
      6.1.3. Approved centre ceases to be approved by Energy & Utility Skills.
      6.1.4. There is malpractice or maladministration in respect of QuartzWeb.
   6.2. Approved centres may terminate the access to QuartzWeb for an authorised user at any time by contacting Energy & Utility Skills.

7. **Payment terms:**
   7.1. Energy & Utility Skills' payment terms and conditions apply to all transactions undertaken using QuartzWeb that are carried out by authorised users on behalf of approved centres.

8. **Data Protection:**
   8.1. In accessing QuartzWeb, authorised users must comply at all times with the General Data Protection Regulations 2018 (and as may be amended from time to time).
   8.2. Authorised users must ensure that individuals are informed their personal data will be shared with Energy & Utility Skills and uploaded onto EUSR. A copy of our privacy notice is available on https://www.eusr.co.uk/privacy

9. **Contact:**
   Authorised users and approved centres can contact Energy & Utility Skills in relation to QuartzWeb by:
   Email: eusr@euskills.co.uk
   Phone: 0845 077 99 22
   Mail: Friars Gate, 1011 Stratford Road, Shirley, Solihull, B90 4BN

10. **General:**
Energy & Utility Skills reserves the right to amend the T&Cs and will notify approved centres and authorised users if this happens.

Appendix 2 - Different User Roles

There are different roles that can be allocated to authorised users:

Role	QuartzWeb functions
Head of Centre or Nominated Contact This is the individual who signs agreements with us, usually a Director or senior manager.	• No QuartzWeb access • You notify us the name of the Lead Administrator(s) for your organisation – via email to EUSR Support • You notify us of any change in main address or payment details – via email to EUSR Support
Lead Administrator Allocated on QuartzWeb by EUSR Support	You will be able to: • Add or delete Administrators and other roles • Amend or delete an individual from a role • Allocate 'Nominated Officer' role – for Power Skills scheme only • All functionality associated with Administrator role

Administrator
 	
Allocated on QuartzWeb by a Lead Administrator
 	
This role can also be allocated by an Approved Trainer (for SHEA, NWH or SCO) or an Approved Assessor for BESC:AME) if they do not undertake their own administration
	You will be able to:
	• Add, view, amend and withdraw information
	• Administrative functions available include:
	  • Add other staff members into other roles
	  • Upload registrations or batches, photographs and scheme evidence
	  • Attach new modules or schemes to existing registrations
	  • Check individual registration information and history for your whole organisation
	  • Record assessment or test results
	  • Book a course (SHEA, NWH and SCO only)
	  • Download training materials (for SHEA, NWH and SCO only)
	  • Send out authorisation links for CBL courses
	  • Add a return delivery address for EUSR ID Cards – if not the main address
	  • Track batch progress in work-flows

Role	QuartzWeb functions
Approved Trainer (SHEA, NWH and SCO only) Allocated on QuartzWeb by EUSR Support	You will only be able to see information for Batches where your name has been detailed as the Approved Trainer. You can: • Check individual registration information and history for your organisation where you are the detailed Trainer • Download training support materials where available e.g. Power Point slides, Programme Leaders Guide, Question Papers, Answer Sheets, attendance register for own use, H & S leaflets • Allocate an Administrator to perform activities on your behalf (via Centre Management tab)
Approved Assessor (BESC:AME only) Allocated by EUSR Support	You will only be able to see information for Batches where your name has been detailed as the Approved Assessor You can: • Check individual registration information and history for your organisation where you are the detailed Assessor • Allocate an Administrator to perform activities on your behalf (via Centre Management tab)
CBL Administrator Only for those centres delivering a scheme or programme with CBL Allocated by Administrator	This role has very limited functionality. In this role you will be able to: • Issue authorisation links to individuals taking the CBL assessment • Download materials such as evaluation forms, HSE leaflets, attendance register (for own use), registration forms (for own use)