



# ITC Policies and Procedures Guide

PEARSON

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# Overview

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## Welcome!

This guide describes the policies and procedures for running Internet Test Centres (ITCs) and managing the registration and delivery process for CITB tests. It provides information on standard processes that should be followed for a variety of tasks, such as checking candidates in at the ITC.

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## Contacting Pearson VUE CITB Customer Services:

<b>0800 731 6658 Option 1; option 1.</b>
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## About this Guide

This guide covers the policies and procedures that must be followed at all ITC's. For information on the setup and installation of the Pearson VUE™ Testing System, refer to the installation guide. For information about specific CITB policies, refer to the Exam Sponsor Guide.

## Chapter Descriptions

- ❖ **Chapter 1 – Overview**
- ❖ **Chapter 2 - Pearson VUE Certified Test Administrator:**  
Describes the roles and responsibilities of test administrators and the requirements for becoming a test administrator.
- ❖ **Chapter 3 - Software and Hardware:** Contains information about the components of the Pearson VUE Testing System and details on updating and reinstalling Pearson VUE software.
- ❖ **Chapter 4 - Managing Your ITC:** Covers a variety of topics involved in running an ITC, such as setting up user accounts for the Pearson VUE software applications, specifying when your ITC is open and changing asset information.

- ❖ **Chapter 5 - Maintaining Security:** Provides security requirements for ensuring a secure and safe testing environment.
- ❖ **Chapter 6 - Daily Startup/Daily Shutdown:** Includes information about tasks that need to be performed at the ITC on a daily basis, such as checking the ITC schedule.
- ❖ **Chapter 7 - Registering and Scheduling Candidates:** Contains comprehensive information about the candidate registration and scheduling procedures that are performed through the Registration Manager application.
- ❖ **Chapter 8 - Checking in Candidates:** Provides information on the sign-in process, from greeting candidates initially to escorting candidates into the test room.
- ❖ **Chapter 9 - Managing Test Delivery:** Explains the tasks that must be performed while candidates are taking tests. This includes using the Delivery Manager and Exam Monitor applications.
- ❖ **Chapter 10 - Signing out Candidates:** Describes what must happen when a candidate finishes a test and is ready to leave the ITC.
- ❖ **Chapter 11 - Handling Incidents and Communicating:** Contains details on using the Incident Reporting system to file reports about unusual events that occur at the ITC.
- ❖ **Chapter 12 - Using Online Reports and Resources:** Describes the tools available through the VSS web site and provides information on how to use features such as reports.

## Updating this Guide

You can find updates and the most current version of the guide on the VSS web site (<http://vss.pearsonvue.com>).

Pearson VUE documents are available in Adobe® Acrobat® .pdf format. This means you must have Acrobat Reader on your PC in order to read a file. If you do not have Acrobat Reader, you can download it free from the Adobe Systems web site:

1. **Use your web browser to navigate to the following site:**  
**<http://www.adobe.com>.**
2. **Click the Get Acrobat Reader icon.**
3. **Follow the installation and usage instructions provided by Adobe.**

After Acrobat Reader is installed on your PC, log in to the VSS web site. Click the **Downloads** button in the upper right corner of a web site page to display a list of files you can download. Click the link in one of the categories, find the appropriate document, and click on the icon next to the document. Then follow the directions on the screen.

The file will open within your web browser. You can read the document on-screen, print it or save a copy to your local system. You cannot make changes to the file.

## About Pearson VUE

Listed below are some of the main groups and positions within Pearson VUE that provide support to ITC's:

- ❖ **Channel Quality** -- Responsible for quality assurance throughout the ITC network, including ITC quality issues and the test administrator training and test. Communicates with ITC's about operational issues, such as quality tips and software update deadlines.
- ❖ **Information Security** -- Establishes security policies, procedures, and guidelines and educates employees about information security and privacy. Monitors security compliance, responds to security breaches, investigates candidate or ITC fraud and misconduct, and provides forensic analysis services to CITB.
- ❖ **VSS** -- Provides technical support to the ITCs. Assists with installation of Pearson VUE Testing System software and all other Pearson VUE software and hardware. Assists with rollout of new software releases.
- ❖ **CITB Call Centres** managed by Pearson VUE. Answers general inquiries and can assist registering and booking tests.
- ❖ **Program Coordinator** -- Acts as the primary operational CITB contact. Executes and manages the data collection, distribution and reporting of sponsor programs. Acts as an escalation point for service-related problems and successes.

## What Pearson VUE provides

Pearson VUE is eager to achieve quality test delivery. Here are just some of the services Pearson VUE provides to help you attain and maintain that quality.

- ❖ This ITC Policies & Procedures Guide and the Pearson VUE Certified ITC Administrator Test cover the current standards for customer service, professionalism and security.
- ❖ The Exam Sponsor Guide describes policies and procedures specific to CITB.
- ❖ We provide you with training to prepare for test administrator certification, along with ongoing training to help you maintain that certification.
- ❖ The VSS web site offers you quality advice and customer service tips.

- ❖ We review all RMA reliability reports and let you know how you can improve, when necessary.

## ITC Responsibilities

Security	Compliance	Professionalism	Environment
<p>Follow security procedures as described in the ITC Policies and Procedures Guide.</p> <p>Report unusual or suspicious activity via the VSS Incident Reporting System.</p> <p>Respond with complete, accurate and timely information during an investigation of unusual or suspicious activity.</p> <p>Keep Pearson VUE applications secure by ensuring that staff members use their own usernames and passwords and do not share them.</p>	<p>Return results to Pearson VUE on the same day a test is delivered by running the Remote Maintenance Agent (RMA) via the Application Wrapper.</p> <p>Perform software upgrades in a timely manner.</p> <p>Contact Pearson VUE if your ITC must close for an extended period of time.</p> <p>Document testing candidate complaints or issues with test delivery on the same day they occurred, via the VSS Incident Reporting System.</p>	<p>Welcome and handle testing candidates in a courteous and professional manner.</p> <p>Enter candidate data accurately in Registration Manager.</p> <p>Prevent inconveniencing candidates by maintaining an appropriate schedule in Site Manager and appropriate staffing of Pearson VUE test administrators.</p> <p>Collect the test fee specified by CITB when registering candidates and ensure that invoices are paid in a timely manner.</p> <p>Deliver test within 30 minutes of the scheduled appointment time.</p>	<p>Maintain a comfortable and quiet testing facility.</p> <p>Meet or exceed the minimum equipment and facility requirements.</p>

## ITC Objectives

ITCs are expected to:

- ❖ Ensure test administrators are courteous and professional.
- ❖ Enter accurate candidate data via Registration Manager.
- ❖ Maintain appropriate schedules via Site Manager.
- ❖ Maintain appropriate staffing of test administrators to prevent candidate inconvenience.
- ❖ Collect the appropriate test fees from the candidate as specified by CITB.

- ❖ Provide distraction-free testing.
- ❖ Meet minimum equipment and facility requirements.
- ❖ Use the Pearson VUE Application Wrapper and communicate with the hub via RMA to ensure timely preparation of tests, timely return of test results, and timely upgrades to Pearson VUE software.
- ❖ Deliver tests in a timely manner.
- ❖ Follow procedures described in the ITC Agreement and this ITC Policies & Procedures Guide. Included are security procedures such as continuous invigilating of all candidates and other measures to ensure the integrity of test delivery.
- ❖ Use the Administrator Override options (such as the option to extend the time allowed for a test) only when permission is given via VSS.
- ❖ Report unusual or suspicious activity via the VSS web site Incident Reporting system.
- ❖ Respond with complete, accurate and timely information during an investigation of unusual activity.
- ❖ Always accurately capture a candidate's personal details, including clear images and signatures.

## ITC Roles

Depending on the size of a test centre, an ITC may have different people performing different roles or a few people may perform multiple roles.

- ❖ The **Test Administrator** is responsible for the day-to-day processing and monitoring of candidates.
- ❖ The **Technical Contact** is the person responsible for helping set up the ITC and the Pearson VUE Testing System software. This user will be mainly interested in the information contained in the installation guide.
- ❖ The **Test Centre Manager/Business Owner** is the person ultimately responsible for managing the ITC. This person is responsible for overall ITC quality and security.

## Guidelines for ITC corrective action

If your ITC is found to be below acceptable levels of quality and/or test security, we put your ITC on a corrective action plan, which can include suspension of test delivery. As a last resort, your ITC will be inactivated and the Software Licence will be terminated.

The following sub-sections provide *guidelines* for corrective action in response to an incident that violates quality or security of test delivery. The violations and corrective actions listed are examples, and additional corrective actions may be taken such as the recertification of the test administrator.

One action that may be taken is to suspend test delivery at your ITC. A suspension may last for days, weeks, months or as long as necessary to indicate that improvement has been made. If an incident is repeated after a suspension is lifted, the next step may be to end the Software Licence Agreement. The actions of suspension and termination of the Software Licence Agreement can be communicated verbally and will be confirmed in writing via a VSS Incident Report, email message or letter to the ITC.

### **Disclaimer**

The section describing corrective actions is intended for guidance and general informational purposes only. It does not extend, restrict or modify the rights or remedies of Pearson VUE or the ITC under the Software Licence Agreement.

## **One or more warnings before suspension or termination**

- ❖ ITC closed during scheduled tests
- ❖ Failure to contact CITB and Pearson VUE regarding long-term unavailability of ITC (12 months or longer)
- ❖ Failure to contact VSS when technical problems affect test delivery
- ❖ Not requiring candidates to sign in/out on the test log
- ❖ Failure to check candidate identification as required
- ❖ Failure to have candidates sign the epad to confirm they have read the Candidate Rules Agreement and Fair Processing Notice (FPN)
- ❖ Not updating contact details in Site Manager
- ❖ Sharing passwords
- ❖ Allowing candidates to test without dividers in place between test stations
- ❖ Test administrator on staff is not Pearson VUE certified
- ❖ Staff members who are not Pearson VUE certified logging into Delivery Manager
- ❖ Extending length of test without approval from Pearson VUE
- ❖ Restarting a test without approval from Pearson VUE
- ❖ Repeated failure to return test results within 24 hours of test delivery
- ❖ Allowing candidates to take personal items into test room
- ❖ Failure to update software by required deadline
- ❖ Failure to meet minimum facility requirements
- ❖ Not invigilating tests correctly



## **Immediate suspension**

- ❖ Repeated warnings or failure to implement required corrective actions or other instructions provided by the Pearson VUE Channel Quality team
- ❖ Failure to properly and continuously invigilate a testing candidate
- ❖ Failure to report address change to Pearson VUE and CITB
- ❖ Test administrator taking any of the CITB tests at their own ITC
- ❖ Allowing unauthorised access to test delivery workstations or to test content
- ❖ Failure to adhere to CITB rules and retake policies
- ❖ Failure to return test results, requiring candidate to retest

## **Immediate termination and report to CITB**

- ❖ Assisting candidate with answering test items
- ❖ Allowing candidate to possess notes or other prohibited items during test delivery
- ❖ Failure to report observed candidate cheating to Pearson VUE
- ❖ Conducted tests at areas other than the approved test room location
- ❖ Providing incomplete, incorrect or misleading information to Pearson VUE
- ❖ Failure to correct violations
- ❖ Any deliberate misuse of the Pearson VUE™ Testing System or copying or disclosure of test content
- ❖ Any fraudulent, unethical or criminal behaviour that adversely affects Pearson VUE or CITB.

# ITC Test Administrator

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This chapter contains the following sections:

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<a href="#">Test administrator roles and responsibilities.....</a>	<a href="#">11</a>
<a href="#">Becoming a test administrator.....</a>	<a href="#">12</a>
<a href="#">Resigning a test administrator.....</a>	<a href="#">14</a>

## Welcome

The test administrator is arguably the most important person within the CITB ITC testing network. Because the test administrator is often the first person with whom testing candidates interact, it is important that he or she is thoroughly trained on the applications and procedures necessary to carry out the registration and testing functions. For best practice, it is recommended that your ITC train and certify more than one test administrator so that a backup is always available.

As a test administrator, you will be responsible for managing the test delivery process. This means you will learn how to use the Pearson VUE™ Testing System applications, including Site Manager, Admissions Manager, Registration Manager, and Delivery Manager.

You will also be welcoming, checking in and monitoring candidates. This requires skillfully combining friendliness with a “no nonsense” attitude towards candidates, so that candidates know they are in a professional environment in which the testing process is taken seriously. You will be ensuring that candidates have a pleasant and comfortable testing environment, in which they have the opportunity to do their best. You will be safeguarding test security by, for example, ensuring that candidates do not remove questions or answers from the test room. As a test administrator, you will help both your ITC, CITB and Pearson VUE maintain a reputation for quality and integrity.

As you can see, you have an extremely important role to play. Although your tasks can seem overwhelming at first, we want to assure you that Pearson VUE is here to assist you at all times. Our goal is to help you perform your role to the best of your ability and to help make it an enjoyable experience for you. This guide provides you with everything you need to know about running an ITC. To make sure that you are comfortable in your role, Pearson VUE will arrange a training call with you to go over the most important policies and procedures and to answer any questions you may have before your ITC is activated. Welcome and good luck!

## Test administrator roles and responsibilities

After you have become a test administrator, you will be responsible for fulfilling the duties associated with operating a test centre on behalf of your ITC, Pearson VUE, and CITB.

### General responsibilities

- ❖ Be professional and courteous at all times.
- ❖ Create a comfortable, pleasant environment for the candidate.
- ❖ Keep the contact information in Site Manager up to date by creating accounts for new test administrators and deleting accounts that are no longer needed.
- ❖ Follow the candidate check-in steps as specified in the Admissions Manager application. Only test administrators may check in candidates for tests.
- ❖ To ensure that neither Pearson VUE nor your ITC is liable, always verify that candidates take the intended test. Sometimes candidates register for the wrong test. When checking in a candidate, always ask him or her to verify the candidate name and test name shown in the Admissions Manager window. Before you show candidates how to start a test, have them verify the candidate name and test name shown in Delivery Manager.
- ❖ Know your user ID and password for the Pearson VUE applications you are authorised to use. These log-in details are confidential; do not share these with others.
- ❖ Keep all candidate and test information confidential.
- ❖ Maintain order and quiet in the test room.
- ❖ Monitor every candidate during EVERY testing session, for the entire test session. Only test administrators may invigilate tests.
- ❖ Not allow candidate personal belongings inside test room
- ❖ Report all incidents by completing an Incident Report.
- ❖ Respond to Incident Reports when necessary, as described below.

## Incident reporting responsibilities

Test administrators are responsible for addressing incidents that are assigned to them through the Incident Reporting (IR) system available on the VSS web site. For example, a test administrator may be assigned an incident related to missing candidate results. A test administrator could also be assigned incidents related to customer service, such as a candidate reporting that the ITC was closed when he or she arrived for a test. In these cases, the test administrator may be required to provide details about the incident and then discuss it with someone in the Channel Quality group at Pearson VUE.

Whenever you are required to address an incident, you will receive an email message. This lets you know that you need to log on to the VSS web site, find the Incident Report, and determine what needs to be done. Depending on the incident type, you should either update the Incident Report with detailed information or call VSS to get help in handling the incident.

## Becoming a test administrator

The manager of an ITC determines who will become a test administrator.

The test administrator will need to pass the ITC Administrator Test in order to deliver CITB tests.

- ❖ **Pearson VUE ITC Administrator Test** -- Test administrators are required to pass the Pearson VUE ITC Administrator Test to become a test administrator and recertify each year. This tests knowledge of Pearson VUE applications and ITC policies and procedures. The test is CITB assurance that only qualified test administrators will be able to deliver tests.

## Test administrator training

Pearson VUE provides test administrators with a training program consisting of several related pieces. Since these pieces are designed to be used together, it is important that you go through each section as indicated below before taking the certification test.

### **Read through all chapters of the ITC Policies & Procedures Guide.**

The chapters are designed to familiarise you with the testing process, the responsibilities of ITC's and the roles and duties of the test administrator. This guide can be found by logging on to the VUE Support Services (VSS) web site and by clicking the Test Centre Guide icon at the top of the screen.

The guide describes which tasks need to be performed at your ITC each day. It covers specific procedures that must be followed when performing tasks such as checking in candidates for tests.

In addition, this guide provides detailed information on Pearson VUE's Site Manager, Admissions Manager, Delivery Manager, and Registration Manager Applications.

❖ **Supplemental Training Presentations.**

Additional training tutorials have been created to assist in topic training for the test administrator. These tutorials consist of a series of three training modules that are located on the VUE Support Services (VSS) web site in the Downloads icon in the Training Materials category. These courses provide information on administering tests in ITC's. When you open the document, maximise the screen (if necessary) to view the presentation. Content for some of the trainings will appear and advance automatically, so please wait for all of the content to appear on the slide before moving to the next slide. Some trainings require you to download the file so refer to the special instructions called "Instructions for VSS Downloading Training Materials" found under the same Training Materials category.

❖ **Participate in a training call (if applicable).**

Depending on what training is required for your ITC, you may need to participate in a training call. During a training call, you review the ITC policies and procedures and verify that you are authorised in the Admissions Manager application to deliver tests. To schedule a training call, contact Pearson VUE.

❖ **Take the Pearson VUE ITC Administrator Test.**

The following sections describe the test and explain how to register for it.

## **Preparing for the ITC Administrator Test**

The Pearson VUE ITC Administrator Test, tests your knowledge of the skills you will need to use on a daily basis to administer and deliver tests at your ITC. To prepare for the test, study this guide until you are thoroughly familiar with the Pearson VUE applications and with the policies and procedures.

The ITC Administrator Test covers the following topics:

### **General Responsibilities**

- ❖ proper testing environment
- ❖ invigilating requirements
- ❖ who to contact for help and when
- ❖ test log requirements
- ❖ factors affecting a candidate's performance

### **Incident Handling and Reporting**

- ❖ dealing with inappropriate behaviour
- ❖ processing late arrivals and no shows

- ❖ problems with delivering tests
- ❖ when and how to complete an Incident Report

### **Pearson VUE Applications**

- ❖ Site Manager, Admissions Manager, Delivery Manager, and Registration Manager features
- ❖ using equipment such as cameras and signature pads
- ❖ identifying and knowing when to use the override options
- ❖ printing the score report
- ❖ how candidates can register for tests

### **Candidate Orientation**

- ❖ sign-in and sign-out process
- ❖ test log requirements
- ❖ candidate rules

### **VSS Web Site**

- ❖ how to access the site
- ❖ which services are available through the site

## **Scheduling the ITC Administrator Test**

When you are ready to take the administrator test, use Registration Manager to register yourself for it. If you are not sure how to do this, please contact your local VSS team.

Be sure to schedule the test at a time when you will not be interrupted with other tasks. **You can use this guide for reference while you take the test.**

## **Resigning a test administrator**

You may need to resign a test administrator if they leave your ITC:

To ensure security at your ITC, follow these steps to resign an administrator:

1. **To send Pearson VUE information about the resignation, open a VSS Incident Report on the VSS web site. Include the test administrator's name, the reason for the resignation and the date of resignation.**
2. **If the employee is leaving your ITC, delete his or her name from the Personnel category in Site Manager. If the employee will continue to make registrations but will not administer or invigilate tests, you can simply remove the "May admit candidates and deliver exams" permission from his or her account in Site Manager.**

# Software and Hardware

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This chapter contains the following sections:

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## About the installation requirements

The minimum specs should *at least* be used for any ITC which will deliver tests using the VTS application (which includes Site Manager, Registration Manager and Delivery Manager).

The Pearson VUE ITC software may require the installation of the VTS software application. The testing system may be installed in one of two scenarios. Whichever scenario is installed, the hardware and software must meet Pearson VUE's minimum requirements. **For more information about the minimum system requirements and the two installation scenarios, refer to the installation guide.**

## System Requirements

The installation guide lists the minimum system requirements for installing and running the Pearson VUE Testing System, and for operating as an ITC. The minimum requirements may change from time to time.

You should also refer to the installation guide for information about the topics listed below:

- Shared File Storage
- Software licences
- Virus prevention
- Internet access
- Printer
- Monitor refresh rate
- Optimising testing system performance

## Admissions and candidate monitoring equipment

ITCs need to install the following equipment:

❖ **Logitech Admissions Camera**

The ITC installs either the Logitech QuickCam Pro 9000 Webcam or the Logitech HD C615 Webcam, used to take candidate photos. This camera is mounted in a stationary position near the administration workstation and is focused on a chair where candidates sit while being photographed.



**Logitech QuickCam Pro 9000 Webcam**

❖ **Digital signature device**

The Interlink Electronics ePad Signature Pad Model VP9801 or VP9805 consists of an electronic pad and a stylus (pen) and is also connected to the administration workstation. Candidates provide an electronic signature by signing the pad using the stylus.



It is recommended that ALL ITC's have a back-up web camera and epad in case of any fault. Testing cannot progress without the use of either of these two technical requirements.

**If a signature or image are not captured, the candidate is not able to test.**



## Administration workstation location

The computer that will serve as your administration workstation must be located in an area that is accessible for checking-in candidates because you need to use the Site Manager and Admissions Manager applications. For more information on how to run Site Manager and Registration Manager on a test administrator workstation, see the installation guide.

## Power supply

ITC's must provide a reliable power supply to the administration and delivery workstations, file server and printer.

In some locations, sudden or frequent power failures or outages may be common. To minimise the risk of damage to testing data and equipment, Pearson VUE recommends connecting an uninterruptible power supply (UPS) or other power protection device to the administration workstation or file server where the shared file storage is located.

If you do experience a power outage while testing is in progress, please do the following:

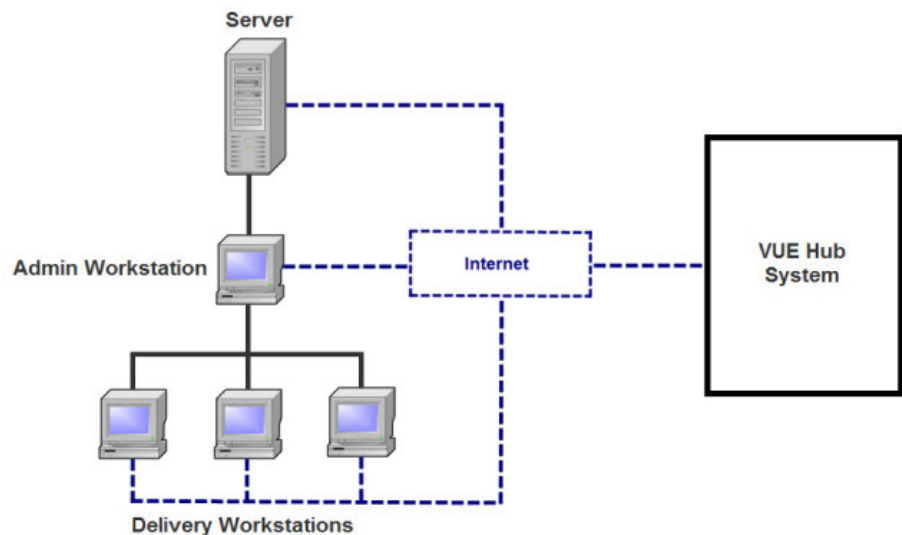
- If you are running a UPS (recommended) OR if the power has not gone out completely, hit **CTRL+SHIFT+F12** and stop the test to ensure no data is lost.

**Note:** For tests delivered through the Administrator application in Delivery Manager, press **Ctrl+Alt+Delete**, and then choose **Log off** to stop the test.

- If you are NOT running a UPS OR if the power has gone out completely, first power down the Delivery workstations, and then power down the administration workstation. Powering down the workstations in this order will minimise the risk of data loss in your ITC.
- If you experience a power cut during testing, please file an incident report.

## Pearson VUE Testing System

A typical Pearson VUE™ ITC configuration consists of an administration workstation and one or more test delivery workstations connected to a local area network with access to shared storage on a server. The Pearson VUE Testing System applications are installed on these workstations. These applications connect to the hub system, which is the computer that runs at Pearson VUE and manages the communication of data with the ITC.



The Pearson VUE Testing System is made up of six software applications that work together to manage test registration and delivery. These applications are described in the following sections.

## Application Wrapper Service and Remote Maintenance Agent (RMA)

Two parts of the Pearson VUE Testing System are responsible for managing the exchange of information between your ITC and Pearson VUE's hub system behind the scenes: the Pearson VUE Application Wrapper and the Remote Maintenance Agent (RMA).

### RMA

Each time a connection is made to the hub, the RMA application checks for information that needs to be transferred between your ITC and the Pearson VUE system. RMA is set up to automatically run at preset times throughout the day, and you do not normally need to intervene.

RMA is the application responsible for performing these critical functions:

- ❖ Replicating data from the hub database to your ITCs database.
- ❖ Preparing candidate registration information (name, appointment time, test name and so on).
- ❖ Downloading test files to the ITC.
- ❖ Uploading service delivery results (SDRs or candidate test results).
- ❖ Checking the hub to see if software updates are available.
- ❖ Transfers results of tests that were taken at your ITC to Pearson VUE.

## Application Wrapper Service

The Application Wrapper is the component that automates the Pearson VUE Testing System. The Wrapper is a scheduler that runs in the background on the ITC's server. It is responsible for performing these functions:

- ❖ Launching RMA.
- ❖ Monitoring RMA to make sure it is working.
- ❖ Restarting RMA if it stops unexpectedly.
- ❖ Stopping RMA when a user wants to stop the service.

With the Wrapper running in the background, RMA automatically connects to the hub computer system over the Internet at scheduled intervals; no intervention is required from anyone at your ITC. During these connections, files and information are exchanged between Pearson VUE and your ITC. In addition, the Wrapper automatically updates your Pearson VUE Testing System applications to the most recent versions. After your testing system is correctly installed, the Wrapper service runs continuously as long as the server is turned on, which is **why it is critical that you do NOT turn off power to the server at the end of the day.**

A properly configured and running Wrapper can be the key to a successful ITC. By automating the test preparation and results processing, the Wrapper helps give test administrators more time to perform other tasks. Pearson VUE requires that the Application Wrapper be used. If you encounter problems getting it configured and working properly, contact VSS for assistance.

## How it all works

When the Application Wrapper is first started (this normally happens automatically when the computer is started), it starts the RMA application. RMA runs in the background and continuously polls the local database to see if it needs to run one of its regular cycles. There are three RMA cycles:

- ❖ **Maintenance Cycle** -- This cycle runs once per day, at approximately midnight local time, and is a complete cycle. This means that the maintenance cycle performs all functions for which RMA is responsible. After the maintenance cycle is completed successfully, RMA checks the Pearson VUE hub to see if any program updates are available. If an update is available, the system begins the automated update process. Otherwise, RMA returns to an idle state and resumes polling the local database.
- ❖ **SDR Cycle** -- This cycle occurs at regular intervals throughout the day. During this cycle, the local database is replicated and test result files are uploaded to the hub. The SDR cycle runs only during an ITC's normal business hours. (These are the hours you have entered in Site Manager, indicating when your ITC is open.) This cycle usually takes only a few minutes to complete.
- ❖ **Express Prep Cycle** -- This cycle is activated when an ITC creates a same-day registration using Registration Manager. During this cycle, only registrations for the current day are processed.

## Alternative RMA methods

The RMA process can be launched manually, if necessary. In this case, a complete maintenance cycle is always performed. A manual RMA process opens a Command Prompt window, allowing you to view the session's progress. After the cycle is completed, the Command Prompt window closes automatically.

## Reliability factors

To ensure that RMA operates correctly, you need to ensure the following:

- ❖ The Pearson VUE Application Wrapper is properly configured and working.
- ❖ The server is left ON at all times.

Since RMA runs in the background, it is difficult to tell whether or not it is working. To help you determine this, Pearson VUE has developed the RMA Connection Log report, which is available on the VSS Web site. This easy-to-use report tells you when RMA was last run, whether it was a manual or automated session and how frequently it is running.

## Site Manager

The Site Manager application runs on the administration workstation and is accessed through a web browser. In order to access the application, a client security certificate is required and it must be issued for each test administrator.

Site Manager allows you to:

- ❖ Define your hours of operation at the ITC and manage other information about your ITC.
- ❖ View and manage the testing schedule at your ITC.
- ❖ Control personnel access to the testing system applications.
- ❖ Manage information about your ITC (hours of operation, resources and personnel).
- ❖ Manage site assets and workstations.

## Admissions Manager

The Admissions Manager application runs on the administration workstation and allows you to:

- ❖ View the ITC schedule.
- ❖ Admit candidates for tests.
- ❖ Monitor the status of tests that are in progress through Exam Monitor.
- ❖ Verify candidate demographic information

## Registration Manager

The Registration Manager application runs on the administration workstation and must always connect to the hub system for its functions. Registration Manager allows you to:

- ❖ Create and edit candidate records and demographic data.
- ❖ Register candidates for tests.
- ❖ Schedule and manage appointments and view test information.
- ❖ Reschedule and cancel candidate tests.

## Delivery Manager

Delivery Manager allows you to:

- ❖ Select tests for delivery and start tests.
- ❖ Launch tests for candidates.

## Backing up the Pearson VUE Testing System

It is critical that you back up your testing system files so that your data will be easily recoverable if something unforeseen occurs, such as a system failure. Pearson VUE recommends that you back up the entire Pearson VUE Testing System shared file storage structure *at the end of each day on which your testing system is used*. If the shared file storage is on a network (LAN configuration), the entire directory structure should be backed up as part of your daily network backup routine. If the shared file storage is on a stand-alone system or a workgroup computer, you should back up *at least* the shared file storage directory structure.

Pearson VUE recommends backing up to removable media such as tape cartridges or removable disks (CDs or Zip disks, for example). Backups should be performed on a daily, weekly and monthly basis. One common backup method is the rotation scheme outlined below:

- ❖ Start with a full backup of the entire system.
- ❖ Perform a differential or an incremental backup on each day on which your testing system is used, which will back up any files that have changed since the last full backup.
- ❖ Perform a weekly full backup, rotating tapes each week so you always have at least two full weekly backups available.
- ❖ Perform a full backup once a month (this can be the same as the weekly backups). Store that backup off-site in a safe location.

## Minimum backup requirements

Although it is recommended that you back up your entire system for ease of restoration and simplicity, we also recognise that it is sometimes difficult to commit the resources needed for this in the ITC environment. However, it is imperative that you back up the volatile data files and directories within the shared file structure on a regular basis. For example, if you are using a Workgroup scenario with the default file location, the shared file storage will be found in this location:

C:\Program Files\VUE\VUE Testing System

Back up *at least* the following three subdirectories within the directory above at the end of each day on which your testing system is used to ensure that your Pearson VUE Testing System data is protected:

- ❖ db - local database
- ❖ evt - event (registration) information
- ❖ exm – exam files

## Installing and reinstalling software

The installation guide contains complete procedures for the initial installation of your Pearson VUE Testing System. If you experience hardware failure or feel you need to reinstall your testing system software for any reason, you are required to contact VSS for assistance. A Pearson VUE technical support representative will help you perform the reinstallation quickly and efficiently, so that your applications will be up and running as soon as possible and will help you ensure that you do not accidentally delete critical data.

## Rebooting the server

In order to run properly, the VTS installer checks for a minimum set of requirements on the server. If components are missing, the VTS Installer may place an executable to update or install that component on the server that will launch the next time a user logs in to the server. You will see a message on the administration workstation requesting a reboot when the update or install has completed. Until the server has been rebooted, the component has not been completely installed.

**Rebooting the server should be completed by your IT support staff. It cannot be performed while Pearson VUE tests are being delivered. The reboot could impact users and other non-Pearson VUE Testing System applications on your network.**

## Updating the software

After your Pearson VUE Testing System has been installed and is running, the Pearson VUE Application Wrapper service runs continuously on the server and performs a variety of tasks. One of these tasks is to run the Remote Maintenance Agent (RMA) application, which keeps your system updated with the latest Pearson VUE data. If the Wrapper service is running correctly, your server is automatically updated with the most recent versions of Pearson VUE applications.

Pearson VUE will notify your ITC when a software update is available and will include information on how you can update the software.

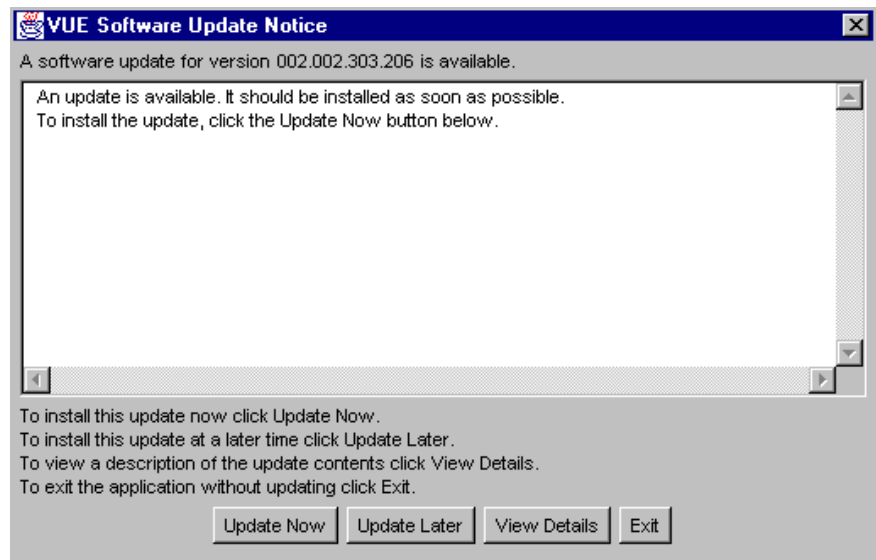
If you use one of these updating methods, be sure to choose a convenient time. For example, the Pearson VUE system will not allow you to perform an update when a test is being delivered on any delivery workstation. On the other hand, if an update is occurring when candidates arrive for their scheduled tests, the candidates will have to wait until the update is finished before they can use the delivery workstations.

You need additional permissions in order to upgrade the Pearson VUE software. If the upgrade is started manually, the Wrapper user should be a local administrator and have full rights to the %VUERoot% directory.

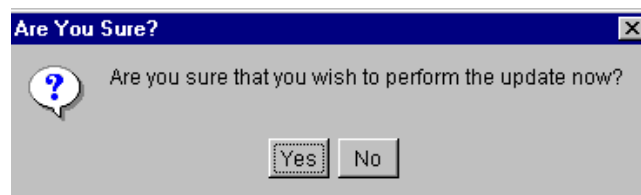
Pearson VUE requires that updates be performed by a specific date, and informs ITCs of that date. If your ITC does not update by the required time, the Registration Manager application will stop functioning until the update is performed.

## Updating when message appears in Registration Manager

One of the methods to update the software includes updating through a message that *may* appear in Registration Manager. The message informs you about the update when you launch or close the Registration Manager application. As shown below, you can choose to update immediately or later and can view information about the new version. Please note that this is only one of the methods and not all ITCs will see this message in Registration Manager.



- ❖ To update immediately, click the **Update Now** button. You are asked to confirm that you want to update; click **Yes** to begin the update. The Software Update window displays progress information while the new files are downloaded and installed.



- ❖ If you do not want to update, click the **Update Later** button. You will continue to receive the update notice each time you launch or close Registration Manager until the update is performed.

We highly recommend that you update to the latest version of software as soon as it is made available. Updating to the latest version ensures that your ITC has all of the enhancements which provide optimum performance of your Pearson VUE Testing System.

## Updating manually with Start Manual Update

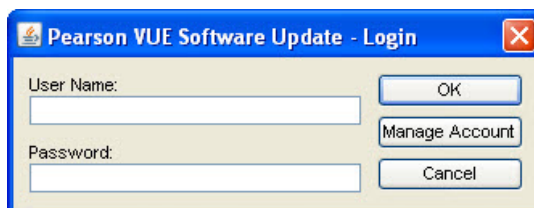
In some cases, VSS may direct you to manually update your testing system. Follow the steps below for using the **Start Manual Update** application to update your testing system.

You must have the “May use the Updater application” permission assigned to your account in order to use the **Start Manual Update** application.

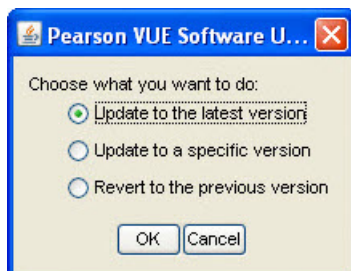
1. On your administration workstation, close all applications and make sure the workstation is connected to the Internet.
2. Click the **Start** button on the Windows taskbar and choose **Programs | VUE Applications | VUE Support Tools | Start Manual Update**.



3. When the Login window appears, enter your user name and password for the Pearson VUE applications.



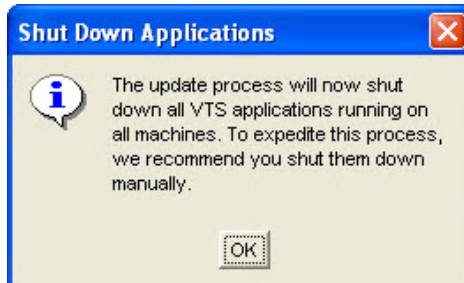
The **Pearson VUE Software Update** window appears.



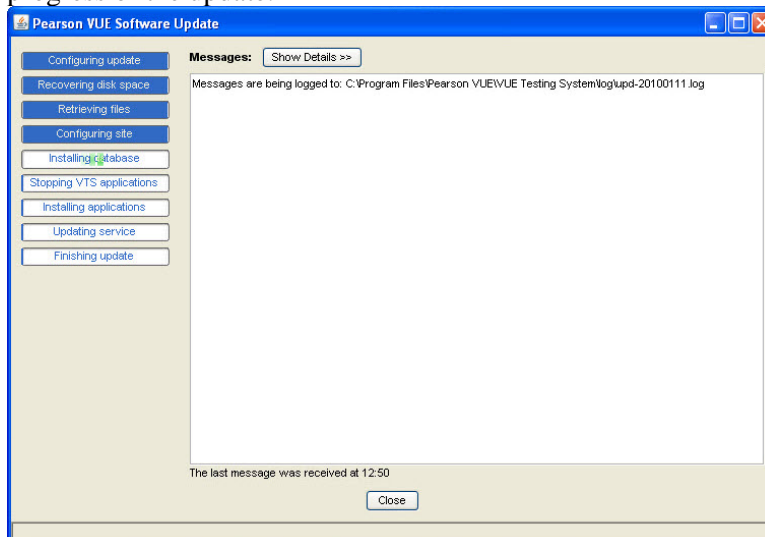
4. Select “Update to the latest version,” and then click **OK**.

**DO NOT** select “Update to a specific version” or “Revert to the previous version” unless directed to do so by VSS.

If the following message appears, click **OK** to shut down all VUE Testing System applications before updating the software.



The **Pearson VUE Software Update** window appears, indicating the progress of the update.



5. When the “Update successful” window appears, click OK. This window indicates that the system has successfully updated the version of the software.



6. On the Pearson VUE Software Update window, click the Close button to close the Software Update window.

## Running RMA manually

In most cases, the Pearson VUE Application Wrapper service will take care of running RMA at your ITC automatically. At times, you may need to run RMA manually at the direction of VSS.

To run RMA manually, click the **Start** button on the Windows taskbar and choose **All Programs | VUE Applications | VUE Support Tools | Remote Maintenance Agent**.

The RMA session runs in a Command Prompt window, shown below, that closes automatically when the RMA has completed.

```

2010-03-02 09:32:53.620:DEBUG:Notification to LCM: "03/02/2010 09:23:39.571!Repl
icater!RMARun - Candidate: Updates replicated (0).".
Replicater - RMARun - Candidate: Updates replicated (0).
2010-03-02 09:32:53.620:INFO :Replicater - RMARun - ClientCandidateID: Updates r
eplicated (0).
2010-03-02 09:32:53.640:DEBUG:Notification to LCM: "03/02/2010 09:23:39.590!Repl
icater!RMARun - ClientCandidateID: Updates replicated (0).".
Replicater - RMARun - ClientCandidateID: Updates replicated (0).
2010-03-02 09:32:53.650:INFO :Replicater - RMARun - ExtensionComponent: Updates
replicated (0).
2010-03-02 09:32:53.650:DEBUG:Notification to LCM: "03/02/2010 09:23:39.627!Repl
icater!RMARun - ExtensionComponent: Updates replicated (0).".
Replicater - RMARun - ExtensionComponent: Updates replicated (0).
2010-03-02 09:32:53.650:DEBUG:Calling SP uspGetReplDataDeliveryEvents022(2000208
81, 02/24/2010 13:40:19.867, 03/02/2010 09:23:38.573, 28) for data retrieval.
2010-03-02 09:32:53.660:DEBUG:
-->SQL: DECLARE @ret INT
EXECUTE @ret = uspGetReplDataDeliveryEvents022
@RSVersionID = 28,
@ReplWindowStartDate = '02/24/2010 13:40:19.867',
@ReplWindowEndDate = '03/02/2010 09:23:38.573',
@HostID = 200020881
SELECT @ret as RetVal

```

After RMA runs, you can verify if the session fully completed by running a report on VSS.

If RMA did not run properly, contact VSS for assistance.

# Managing Your ITC

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This chapter contains the following sections:

<a href="#">Requesting Client Security Certificate for Site Manager.....</a>	<a href="#">27</a>
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<a href="#">Removing a Client Security Certificate.....</a>	<a href="#">32</a>
<a href="#">Changing ITC information in Site Manager.....</a>	<a href="#">34</a>
<a href="#">Opening and closing Site Manager.....</a>	<a href="#">35</a>
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<a href="#">Specifying when your ITC is open and closed (Hours tab).....</a>	<a href="#">39</a>
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## Requesting Client Security Certificates for Site Manager

Client security certificates enable you to securely access a variety of Pearson VUE systems, such as Site Manager. Each test administrator must install a client security certificate for each web browser in each workstation that the test administrator will be using to access Site Manager. You cannot access the Site Manager application on a workstation without an installed client security certificate issued specifically to you.

For example, if the test administrator is using one workstation and two web browsers to access Site manager, such as Internet Explorer and Mozilla Firefox, then two client security certificates need to be issued for the test administrator on that workstation. However, if the test administrator is using two workstations and two web browsers in each workstation, then four client security certificates need to be issued for the test administrator. Two of the four certificates would be used for one workstation and the other two would be used on the second workstation.

A client security certificate expires after one year. You will receive an email reminding you to request a new certificate 30 days before the certificate expires.

To request a client security certificate, follow the steps below:

1. **Log in to the VSS web site.**

2. On the initial screen, select the **Client Security Certificate** link in the **System Stats** table.

System Stats	
Your site is running the current VUE Testing System version of 2.3.1002.301.	
Our records indicate that your Wrapper service is not working. You can check its status by viewing your Site's <a href="#">RMA Connection Log</a> report.	
You can get help getting your Wrapper service working by visiting our <a href="#">FAQs</a> , or by contacting your regional <a href="#">VUE Support Service</a> office. You can also learn more about the Wrapper Service and RMA by reading our <a href="#">RMA and Wrapper Overview</a> document.	
You currently have 0 exams registered for today.	
<a href="#">Click here to get your Site license file.</a>	
<a href="#">Click here to request a Client Security Certificate file.</a>	

A confirmation screen appears after you click the link.

3. Click the **Request a Client Certificate** button.

### Client Certificate Request Utility

You are about to request a Client Certificate.

**NOTE:** A Client Certificate enables a web browser to establish a secured connection to the Pearson VUE online applications. Client Certificates guarantee that only authorized users are allowed to connect.

**Request a Client Certificate**

After you click the **Request a Client Certificate** link, an approval screen appears indicating that the request has been sent and is awaiting approval. However, if a problem occurs and you do not see the approval screen, you must contact VSS for assistance.

When you return to the VSS home page, The System Stats table now displays, "You currently have a pending client certificate request." Once your request is approved, you will receive an enrollment email with instructions on how to download the client security certificate.

4. In the email you receive to download the client security certificate, click on the provided link to access the **Pearson VUE Certificate Services** web site.

Make sure to access the link in the web browser that requires the client security certificate. In most cases, the link will open the web site in the default web browser set up for the workstation. If you need to access the link in a different web browser, copy the link, open the web browser, paste the link in the Address bar, and then hit Enter.

Before accessing the Pearson VUE Certificate Services web site, make sure TLS (Transport Layer Security) is enabled on the web browser which you are requesting a client security certificate for.

**To enable TLS on Internet Explorer:**

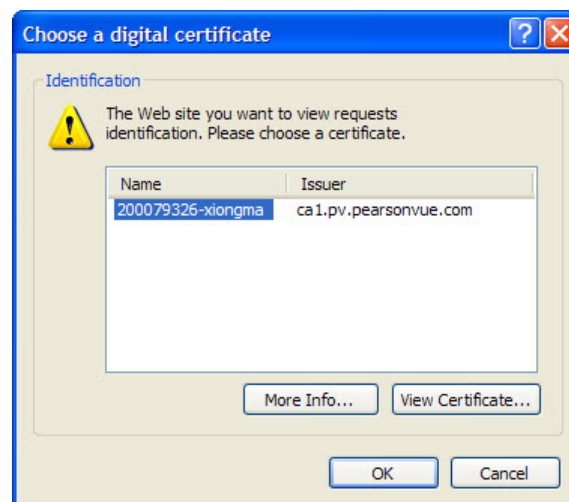
- A. Open the Internet Explorer web browser.
- B. On the **Tools** menu, click **Internet Options**. The **Internet Options** dialog box appears.
- C. Click the **Advanced** tab, and then select the **Use TLS 1.0** check box if it is not already selected.
- D. Click **OK**.

**To enable TLS on Mozilla Firefox:**

- A. Open the Mozilla Firefox web browser.
  - B. On the **Tools** menu, click **Options**. The **Options** dialog box appears.
  - C. Click **Advanced**, and then select the **Encryption** tab.
  - D. Select the **Use TLS 1.0** check box if it is not already selected.
  - E. Click **OK**.
5. **Once you are in the Pearson VUE Certificate Services web site, follow the instructions on the screen to download the certificate.**
- For more information about this process, see the installation guide.
6. **After the client security certificate is installed successfully, you can access the Site Manager application.**

## Choosing a Digital Certificate

Every time you access the URL to the Site Manager application, a certificate window appears asking you to choose a certificate to authenticate, such as the one shown below from the Internet Explorer web browser.



You can set up the web browser to automatically select the client security certificate every time you access the URL to Site Manager **only if one client security certificate** is installed for the browser on the workstation.

If there is more than one client security certificate issued for the web browser on the workstation, then you must select which certificate to use every time you access Site Manager.

To set up either the Internet Explorer or Mozilla Firefox web browser to automatically select a client security certificate every time you access Site Manager, follow the steps below:

### **Internet Explorer**

#### **1. Open the Internet Explorer web browser.**

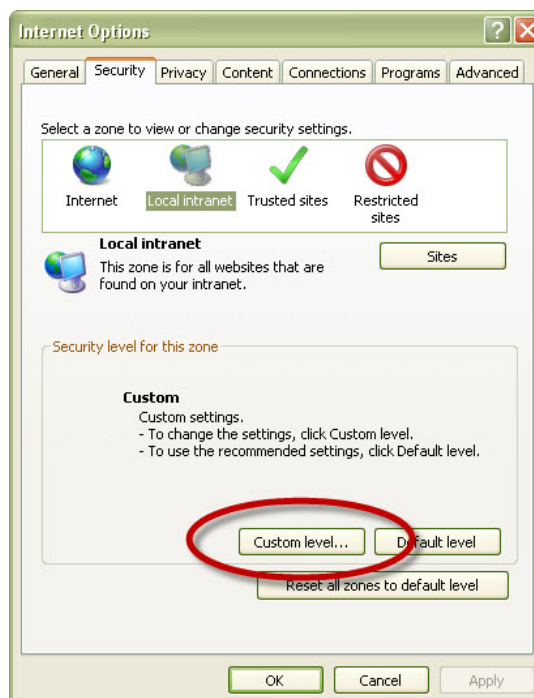
You can open the web browser by either double-clicking the **Internet Explorer** icon located on the desktop or by following the procedure below:

Click the **Start** button, point to **All Programs**, and then click on **Internet Explorer**.

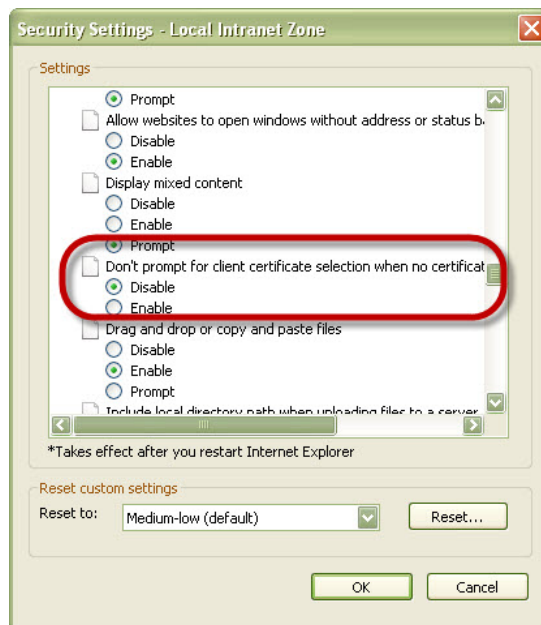
#### **2. On the Tools menu, click Internet Options.**

The **Internet Options** dialog box appears.

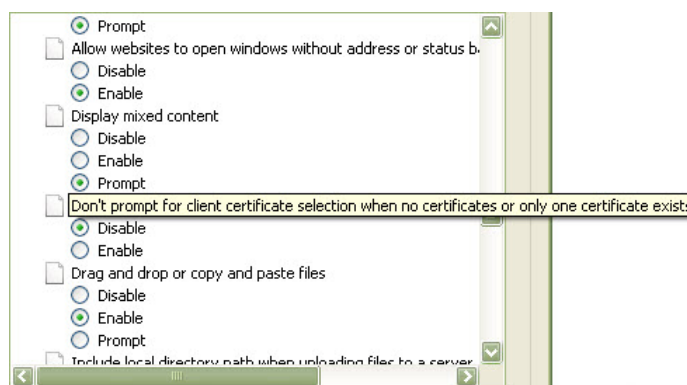
#### **3. Select the Security tab, and then click the Custom Level button.**



4. In the Security Settings – Internet Zone dialog box, scroll down until you see “Don’t prompt for client certificate selection when no certificates or only one certificate exists.”



The dialog box does not allow you to expand the window so that you can see the entire name of the option. You can hover the mouse over the option to see the entire name.



5. Select **Enable** under “Don’t prompt for client certificate selection when no certificates or only one certificate exists,” and then click **OK**.

A warning message may appear asking you to verify the change. Click **Yes**.

6. Click **OK** to close the Internet Options dialog box.

### Mozilla Firefox

1. **Open the Mozilla Firefox web browser.**

You can open the web browser by either double-clicking the **Mozilla Firefox** icon located on the desktop or by following the procedure below:

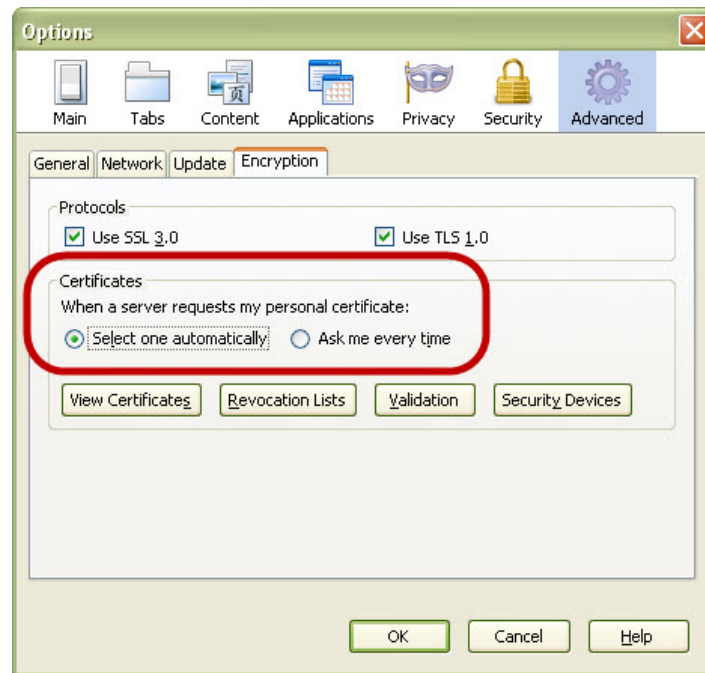
Click the **Start** button, and then point to **All Programs**. Point to **Mozilla Firefox**, and then click **Mozilla Firefox**.

**2. On the Tools menu, click Options.**

The **Options** dialog box appears.

**3. Click Advanced, and then select the Encryption tab.**

**4. In the Certificates area, select the “Select one automatically” option under “When a server requests my personal certificate.”**



**5. Click OK.**

## Removing a Client Security Certificate

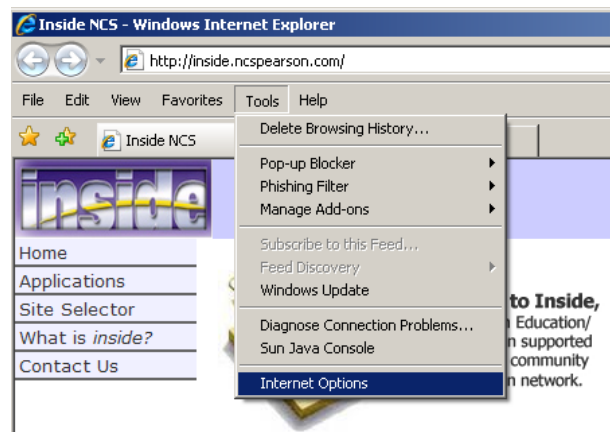
Client security certificates expire after one year. Once you have your new certificate, you will need to remove the expired security certificate. You will also need to remove client security certificates for users whose accounts have been removed from Site Manager.

Follow the steps below to remove a certificate:

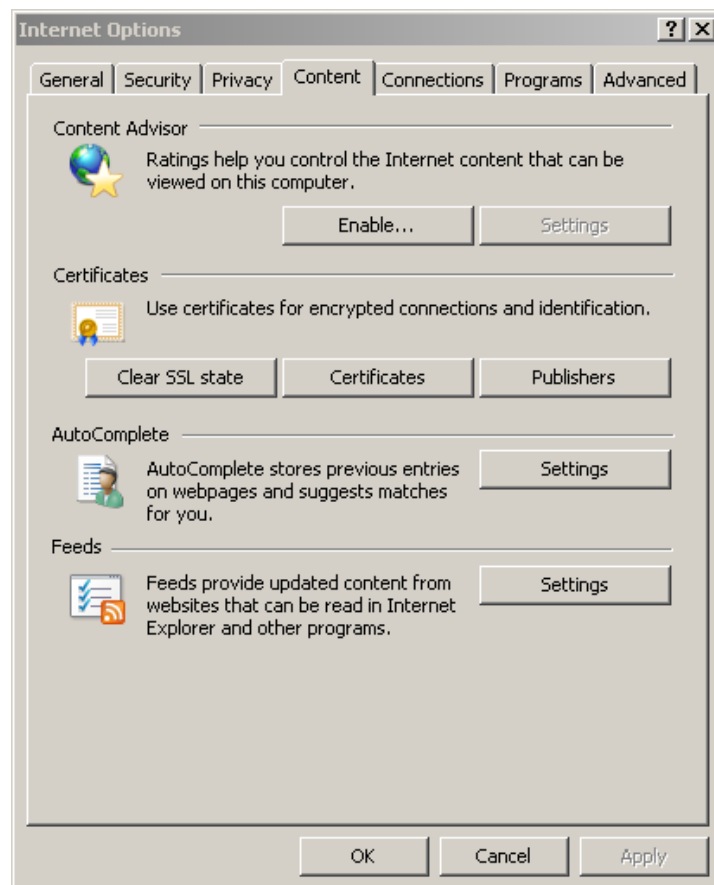
**1. Open Internet Explorer.**



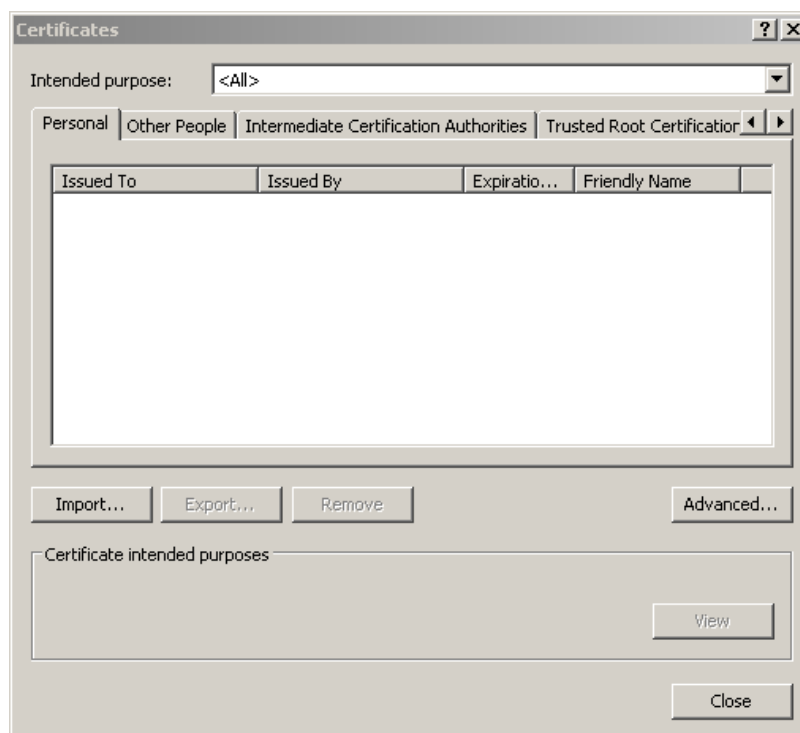
2. In the menu bar, click Tools then select Internet Options.



3. Click on the Content tab. Select the Certificates button.



4. In the Certificates window, select the expired certificate and click the Remove button. Click close.



## Changing ITC information in Site Manager

After you install your Pearson VUE™ Testing System, you use Site Manager to enter information about your ITC, create user accounts for your ITC employees and set up assets for each test delivery workstation. This section describes how to create, delete and edit the Site Manager information. For example, you may need to change your ITC hours, create a user account or create a workstation asset.

To run Site Manager, your Pearson VUE user account must be authorised to use the application.

For security reasons, Site Manager should never be left running unattended. When you take a break, go to lunch, end your work day or ***leave the ITC for any period of time***, be sure to log out of ***all*** applications you have logged in to. The test administrator who is currently registering, invigilating and/or administering tests must log into the applications with their personal username and password.

## Opening and closing Site Manager

You must have the **May use the Site Manager Application** permission assigned to your account in order to use Site Manager. Test administrators who do not have the permission can only view the **Edit User: Account** screen after signing in to change their password and security questions. They will not have full access to the Site Manager application.

A client security certificate is required in order to access the URL to Site Manager. Each test administrator must apply for and install a client security certificate for each web browser and workstation that he/she uses to access Site Manager.

1. **Using your web browser, navigate to the Site Manager application using the following URL:**

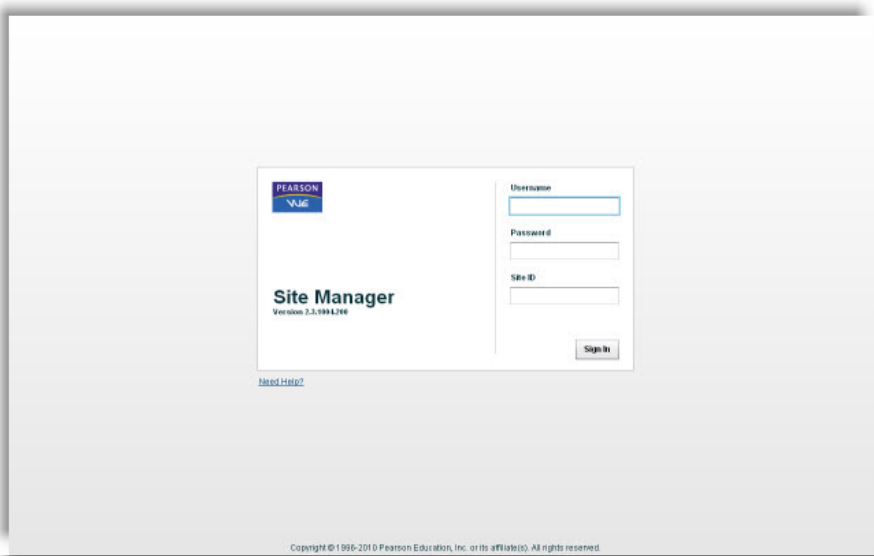
<https://apps.pearsonvue.com/site/>

**OR**

**Click the Start button on the Windows taskbar and choose All Programs | VUE Applications | Site Manager. This will launch a web browser directly to the URL.**

A certificate window appears asking you to choose a certificate. You must select the client security certificate issued to you, and then click **OK**. You can set up the web browser to automatically select a certificate each time you access the URL (only if you have one certificate issued on the workstation).

The following sign-in page appears after you select a client security certificate:



2. **Type your username, password, and Site ID for the Pearson VUE applications.**

If you need assistance with the sign in, click the **Need Help?** link.

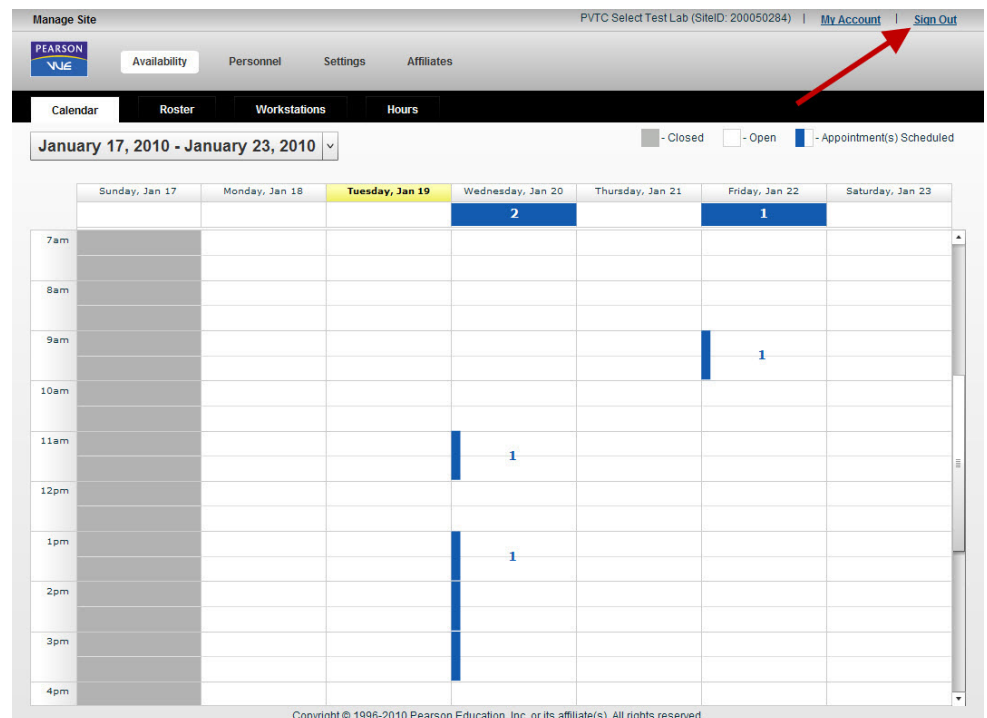
3. **Click the Sign In button.**

If this is your first time signing in to Site Manager or if your password was reset, you will be prompted to change the password. You will also be prompted to change the password if it is expired.

Once you sign in, Site Manager opens. Whenever you open Site Manager, the **Calendar** tab under the **Availability** category is displayed. Refer to the following sub-sections for information on other Site Manager features and windows.

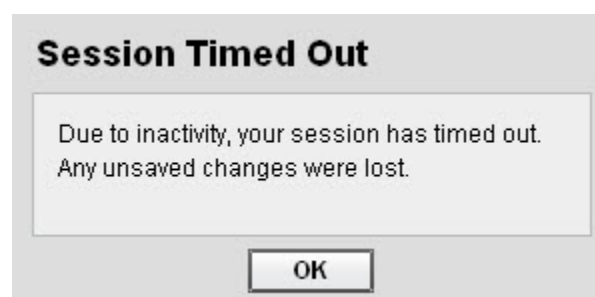
An administrator's account is locked after he or she tries to sign in three times and is unsuccessful. He or she should contact one of the users with the permission to reset passwords/unlock accounts. If they are unavailable, Channel Quality or VSS may be contacted to unlock an account.

To close Site Manager, click the **Sign Out** link located at the top right-side of the screen.



When you sign out of Site Manager, the sign in page appears. You may then close the web browser.

If you are signed in to Site Manager and have been inactive in the application for 15 minutes, Site Manager will automatically log out, and the following screen appears:



After you click **OK**, you are brought back to the sign-in page.

**Site ID** can be found in the top right hand corner of Site Manager.

## Entering address information (Location tab)

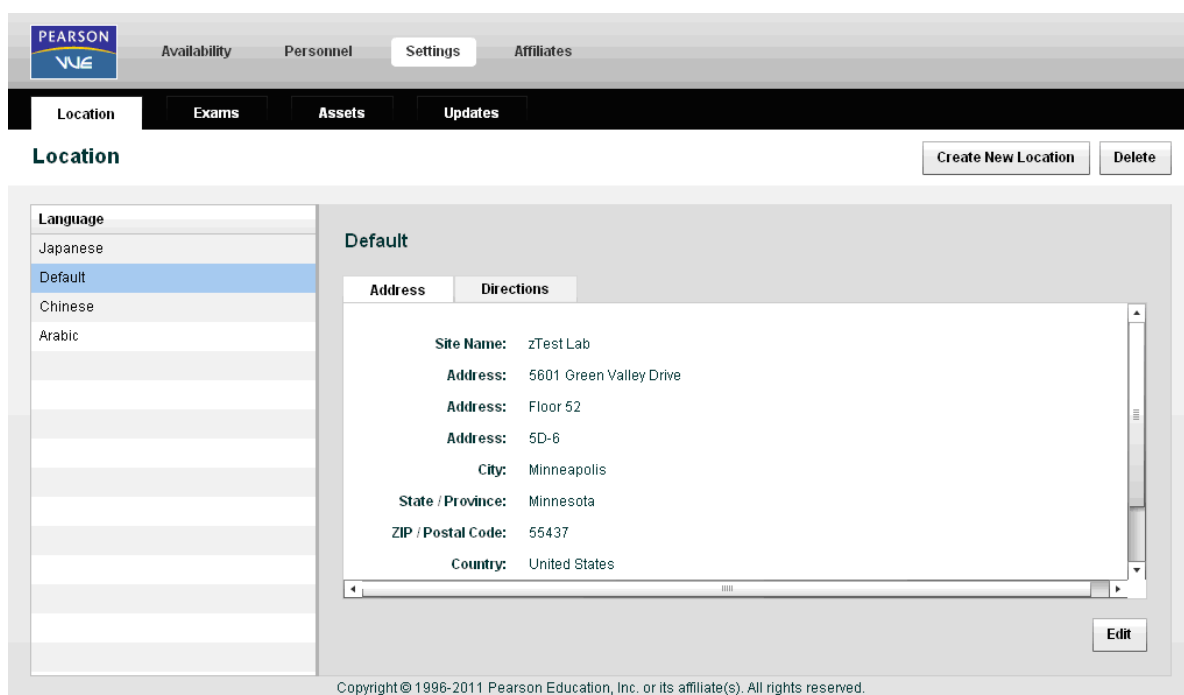
The **Location** tab under the **Settings** category contains the site name, address, phone number and fax number for your ITC. All of this information is used frequently by Pearson VUE and by testing candidates, so be sure this information is up-to-date.

Follow these steps to make changes to your site address information:

If you are moving your ITC, you must contact Pearson VUE **before** making any changes to the address information in Site Manager.

1. In Site Manager, click on the **Settings** category, and then click the **Location** tab.

The **Location** tab displays the address and directions information for your ITC. Select the language in the menu on the left. The default language is English.



2. Click the **Address** tab.
3. Click the **Edit** button located on the right.

The **Edit Address** screen appears.

**Edit Address**

Site Name: Test Lab

Country: United States

Address: \* 5601 Green Valley Dr.

Address:

Address:

City: \* Bloomington

State / Province: \* Minnesota ▼

ZIP / Postal Code: \* 55437

Telephone: \* 952-681-3000

Fax:

\* = Field is Required

[Cancel](#) **Save**

4. Type in your ITCs complete address and city in the corresponding boxes.
5. Choose your state or province in the drop-down list (if applicable).
6. In the Postal Code box, type your ITCs postal code.
7. Type your ITCs phone and fax numbers in the corresponding boxes.
8. Click Save to confirm your changes or click Cancel to discard the changes you made.
9. Click OK to close the Update Directions Notification message.

The information in the **Address** tab is now updated.

## Moving your ITC to a new location

If you are moving your ITC, you must contact CITB and Pearson VUE before making any changes to the address information in Site Manager. Follow the steps below if your ITC is moving:

1. **Contact CITB to arrange a Site Survey of the proposed new ITC location. No tests may be taken at the new location until a successful site survey has been conducted.**
2. **Once the new test room location has been approved by CITB, Pearson VUE will be notified and will re-activate your ITC for testing. The ITC address will be updated on both CITB and Pearson VUE systems.**

## Changing your ITC name

If your ITC's name changes, you need to notify CITB and Pearson VUE to make the change and a new ITC Agreement will be issued under your new company name; the ITC name cannot be edited in Site Manager. Once CITB has received the signed ITC Agreement in the correct company name, the systems will be updated and Pearson VUE also informed.

## Specifying when your ITC is open and closed

The **Hours** tab under the **Availability** category allows you to specify the dates and times your ITC is open and closed for business. This information is used to find available test appointments at your ITC when candidates are scheduling their appointments.

When you click the **Hours** tab under the **Availability** category, all open and closed rules created for your ITC are listed on the screen in a table format, as shown below. The table includes information about each rule's type (either Open or Closed), name, start date, end date, start time, and end time and on which day(s) during the week the rule applies.

You can sort the open and closed rules in ascending or descending order by any of the columns. To do this, click the column name once or twice and an arrow pointing up (ascending) or down (descending) appears with the column name. By default, the open and closed rules are organised by the start date and time. You can also expand the columns by clicking and dragging the right or left edge of the column name.

Manage Site PVTC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

PEARSON VUE Availability Personnel Settings Affiliates

Calendar Roster Workstations **Hours**

**Site Availability Rules (8)** Create New Rule Edit Delete

Type	Rule Name	Start Date	End Date	Start Time	End Time	Day(s)
Open	Normal Business Hours	January 8, 2010	None	7:00 AM	10:00 PM	Mo Tu We Th Fr Sa
Closed	Memorial Day	May 31, 2010	May 31, 2010	All Day	All Day	Mo
Closed	Independence Day	July 4, 2010	July 4, 2010	All Day	All Day	Su
Closed	Labor Day	September 6, 2010	September 6, 2010	All Day	All Day	Mo
Closed	Thanksgiving Weekend	November 25, 2010	November 28, 2010	All Day	All Day	Su Th Fr Sa
Closed	Christmas Eve	December 24, 2010	December 24, 2010	All Day	All Day	Fr
Closed	Christmas Day	December 25, 2010	December 25, 2010	All Day	All Day	Sa
Closed	New Year's Eve	December 31, 2010	December 31, 2010	All Day	All Day	Fr

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## About open and closed rules

It is critical that you establish your ITC hours correctly using open and closed rules as described in this section. You should create closed rules, such as rules for national/local holidays, at the beginning of each year so that you do not have to remember to create closed holiday rules the rest of the year.

Open and closed rules define the hours of operation for your ITC. Open rules define days and hours that your ITC is specifically **open**. Closed rules define days and hours that your ITC is specifically **closed** (such as on holidays or for an emergency).

Open and closed rules are removed weekly from Site Manager 365 days after the date of the rule is past. When it is removed, it is permanently deleted from the system and cannot be recovered. However, rules with no end dates are not removed and will remain in Site Manager.

Listed below are some tips on creating rules:

- ❖ Normally, you will have one open rule to define when your ITC is generally open, such as Monday through Friday, 8:00a.m to 10:00p.m.
- ❖ After establishing when your ITC is generally open, you then create one or more closed rules to define times within the available time periods at which you know your ITC will not be open. For example, you might create closed rules to specify that your ITC is not open on Friday evenings or on New Year's Day.
- ❖ You may want to create a closed rule to cover a lunch period each day, such as from 12:00 p.m. to 1:00 p.m.
- ❖ When you set up your general open rule, you may not want the starting time to be the same time at which test administrators normally arrive for work. It is a good idea to allow time for staff to prepare for the day and to allow for test administrators running late due to traffic, bad weather and so on. Also keep in mind that we recommend to candidates that they arrive 15 minutes before the scheduled appointment time.
- ❖ Be extremely careful not to create a closed rule if there are already appointments scheduled during the period you want to close the ITC. Before creating a closed rule, check for scheduled appointments.

The following sections show some sample rules.

## Normal business hours

In this example, an **Open** rule is created called "Normal Business Hours." This rule specifies that the ITC is available for testing Monday through Saturday, from 7a.m. to 10p.m. (Note that if test appointments are scheduled at 7:00 a.m., candidates may start arriving at 6:45 a.m.)



The **Start Date** is entered for when the open rule will begin, and the **No End Date** check box is selected because this rule applies all year round. Selecting **No End Date** does not allow you to enter an end date below the **Start Date** box.

The screenshot shows the 'Create Rule' dialog box with the following settings:

- Name:** Normal Business Hours
- Type:** Open (selected), Closed
- Start Date:** February 1, 2010
- No End Date:** ☒ (selected)
- Start Time:** 7:00 AM
- End Time:** 10:00 PM
- All Day:** ☐ (not selected)
- Day(s):** Monday, Tuesday, Wednesday, Thursday, Friday (all selected); Saturday, Sunday (not selected)
- Buttons:** Cancel, Save

## Closed for a whole day

In this example, a **Closed** rule is created called “New Year’s Day.” This rule specifies that the ITC is closed and unavailable on January 1, 2010.

The **All Day** check box is selected because the rule applies for the entire day. The **No End Date** check box **MUST NOT** be selected. Selecting **No End Date** will close the ITC every day.

The screenshot shows the 'Create Rule' dialog box with the following settings:

- Name:** New Year's Day
- Type:** Open, Closed (selected)
- Start Date:** January 1, 2010
- End Date:** January 1, 2010
- No End Date:** ☐ (not selected)
- All Day:** ☒ (selected)
- Day(s):** Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday (all selected)
- Buttons:** Cancel, Save

## Closed for part of a day

In this example, a **Closed** rule is created called “Christmas Eve Day.” This rule specifies that the ITC is closed and unavailable starting at 1p.m. on December 24, 2010 until 10p.m. on that date. The **No End Date** check box **MUST NOT** be selected. Selecting **No End Date** will close the ITC between 1p.m. and 10p.m. every day.

### Create Rule

**Name:** Christmas Eve Day

**Type:** ☐ Open ☒ Closed

**Start Date:** December 24, 2010

**End Date:** December 24, 2010 ☐ No End Date

**Start Time:** 1:00 PM

**End Time:** 10:00 PM ☐ All Day

**Day(s):** ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday  
☒ Saturday ☒ Sunday

[Cancel](#) [Save](#)

## Creating or editing an open/closed rule

1. In **Site Manager**, click on the **Availability** category, then select the **Hours** tab.

The **Hours** tab displays all open and closed rules you have previously created.

Manage Site PVTC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

**PEARSON** **VUE** [Availability](#) [Personnel](#) [Settings](#) [Affiliates](#)

[Calendar](#) [Roster](#) [Workstations](#) **[Hours](#)**

**Site Availability Rules (8)** [Create New Rule](#) [Edit](#) [Delete](#)

Type	Rule Name	Start Date	End Date	Start Time	End Time	Day(s)
Open	Normal Business Hours	January 8, 2010	None	7:00 AM	10:00 PM	Mo Tu We Th Fr Sa
Closed	Memorial Day	May 31, 2010	May 31, 2010	All Day	All Day	Mo
Closed	Independence Day	July 4, 2010	July 4, 2010	All Day	All Day	Su
Closed	Labor Day	September 6, 2010	September 6, 2010	All Day	All Day	Mo
Closed	Thanksgiving Weekend	November 25, 2010	November 28, 2010	All Day	All Day	Su Th Fr Sa
Closed	Christmas Eve	December 24, 2010	December 24, 2010	All Day	All Day	Fr
Closed	Christmas Day	December 25, 2010	December 25, 2010	All Day	All Day	Sa
Closed	New Year's Eve	December 31, 2010	December 31, 2010	All Day	All Day	Fr

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2. To create a rule, click the **Create New Rule** button. To edit an existing rule, select the rule in the list, and then click the **Edit** button.

The **Create Rule** or **Edit Rule** screen appears.

3. Select either the **Open** or **Closed** option to indicate whether the rule will specify times and days when your ITC is open or when it is closed.

You cannot save the rule unless you select one of these options.

4. Type an open or closed rule name in the **Name** box.

You must enter a name before you can save the rule. Use a name that clearly indicates the purpose of the rule such as Normal Business Hours, Christmas Holiday or ITC Closed for Repairs.

5. In the **Start Date** and **End Date** boxes, type or select a date for when the rule begins and ends.

When setting up rules for when your ITC is generally open, enter only the start date and times, and select the **No End Date** check box. If you enter an end date, the rules will be in effect only until the end date you specified, and you will need to remember to set up a new rule each time the rule is set to expire.

By default, the current date is automatically entered in the **Start Date** and **End Date** boxes. You must enter the date range for when the open or closed rule will occur. If the rule applies all year round, select the **No End Date** check box.

You can enter dates in one of the following formats:

1/1/03  
January 1, 2003  
Jan 1, 2003

You can also click the Calendar icons next to the **Start Date** and **End Date** boxes to select a date from a monthly calendar view.

**6. In the Start Time and End Time boxes, type or select a time for when the rule applies during the day.**

If the closed rule applies for the entire day, make sure to select the **All Day** check box. You can only select **All Day** for a *closed* rule and not for an *open* rule.

You can select the times using the drop-down list or you can enter times in one of the following formats in quarter-hour intervals, such as 8:00, 8:15, 8:30 (if the **All Day** check box is not selected):

8:30 am\*  
4:30 pm\*  
16:00

\*You should specify a.m. or p.m. If you do not, then military time is assumed, and the time automatically changes to a.m. or p.m. accordingly.

**7. In the Day(s) check boxes, select the days during the week for when the rule applies.**

By default, all the days of the week are selected. A check mark in a box indicates that the rule is in effect on that day. For example, if you want the ITC to be closed every Monday during the specified date range, then clear all other days but Monday. If the rule applies on all days of the week, then leave all the days selected.

The days of the week must fall within the specified date range. If you entered a start and end date that covers a date range of less than one week, you must select at least one day of the week that occurs in the date range you specified.

If you create a rule stating that your ITC is closed all day for one day, such as on January 1, 2010, you may want to leave all the days selected so that the rule is applied no matter which day of the week January 1, 2010 happens to fall on. Site Manager won't allow you to save the rule if at least one day of the week that occurs in the specified date range is not selected.

**8. Click Save to confirm your changes or click Cancel to discard the change you made.**

After you respond to any messages that appear, the open or closed rule is updated in the **Hours** tab.

If you set up a rule that makes the ITC closed for the next 45 days or longer, a message will appear asking you to confirm that you still want to create the rule.

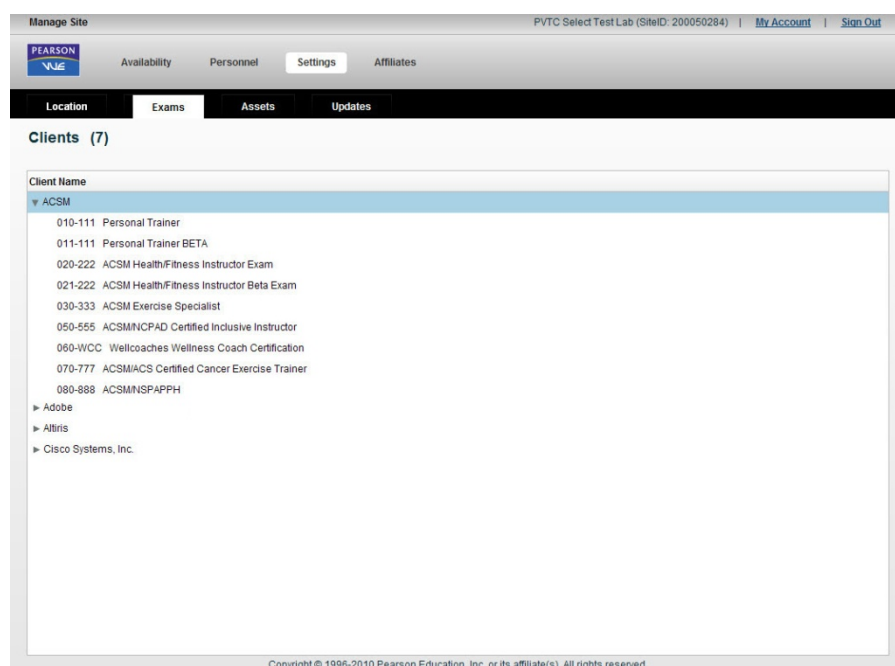
## Deleting an open/closed rule

When you delete an open or closed rule, it is removed immediately. Though open and closed rules are deleted from the system 365 days after the date of the rule is past (except rules with no end dates), it is a good idea to delete rules when they are no longer in effect to prevent confusion.

## Exams tab

The **Exams** tab under the **Settings** category lists all CITB tests for which your ITC is authorised to deliver. Selecting the arrow next to the Client Name will show a drop-down list of these tests.

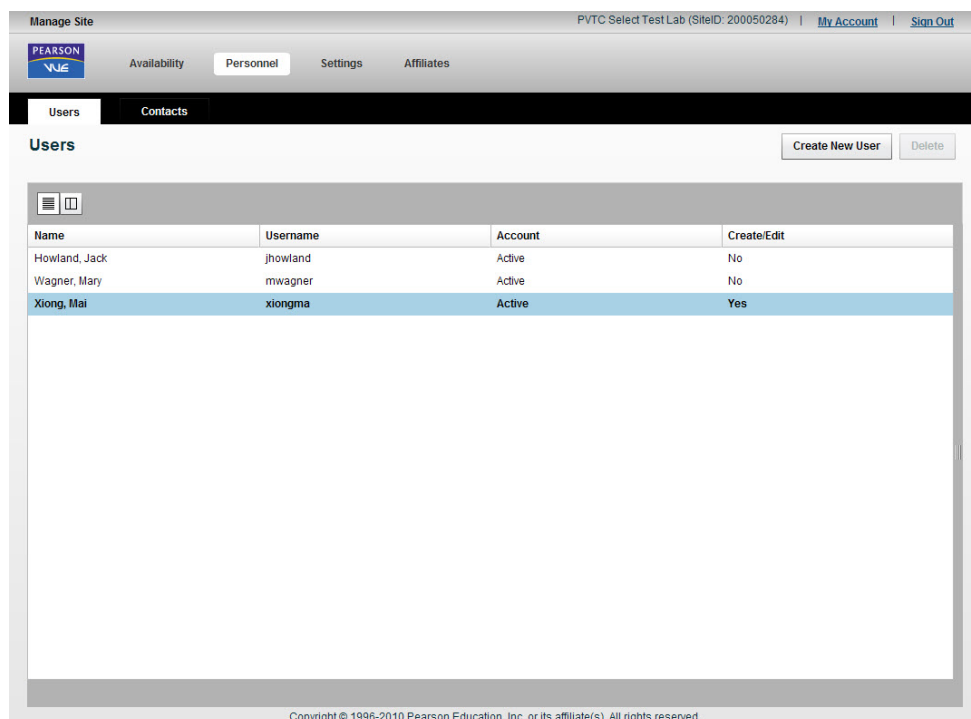
If you notice any discrepancies listed here, contact VSS or send an email to [pvtestcenterquality@pearson.com](mailto:pvtestcenterquality@pearson.com).



## Setting up user accounts, passwords, and permissions (Personnel)

The **Users** tab under the **Personnel** category in Site Manager allows you to set up user accounts for the Pearson VUE Testing System applications. You can enter a user's contact information, set and change the password, and choose which applications a user may run.

When you view the **Users** tab, a list of user accounts already defined at your ITC is displayed. See the image below.



Your user account is bold in the list because you are the user who is logged in to the application. By default, the list is sorted by last name. The list includes the following information for each user account:

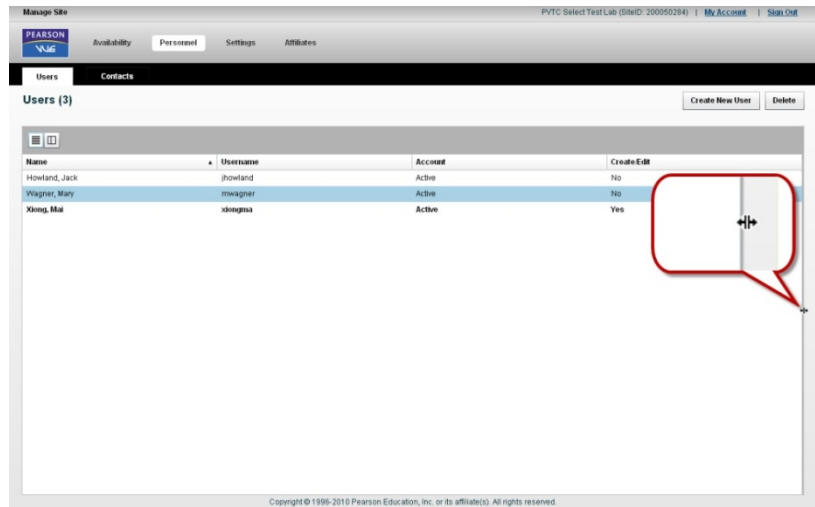
- **Name** -- This is the full name of the user for the account.
- **Username** -- This is the name the user will use to sign in to all Pearson VUE Testing System applications to which he or she is given access.
- **Account** -- This is the status of the account. Either **Active**, **Expired Password**, or **Locked** displays.
- **Create/Edit** -- This column indicates which user has the **May create and edit (other) users** permission.

You can view more information about a user account by displaying the Detailed View pane in one of the following ways:

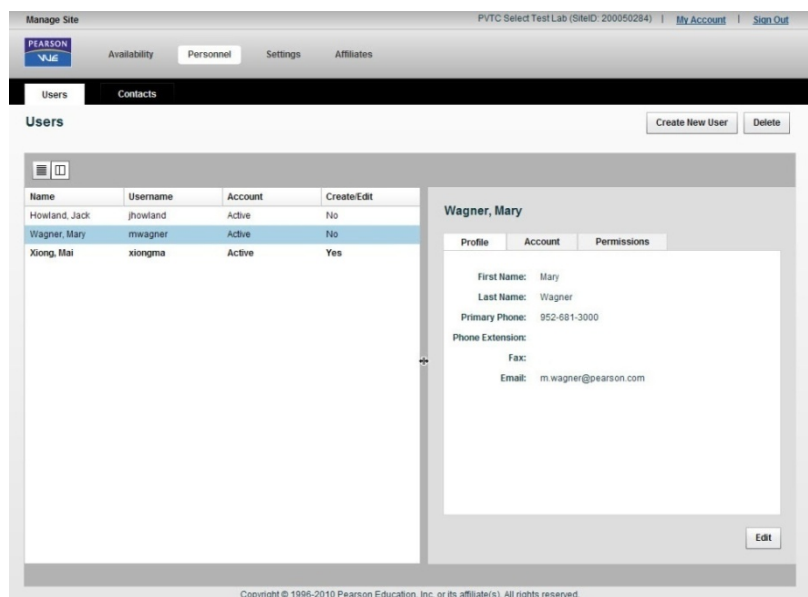
- Clicking on the user in the list.

- Balancing the mouse pointer on the right side of the pane, and then clicking and dragging to the left (see the images below).

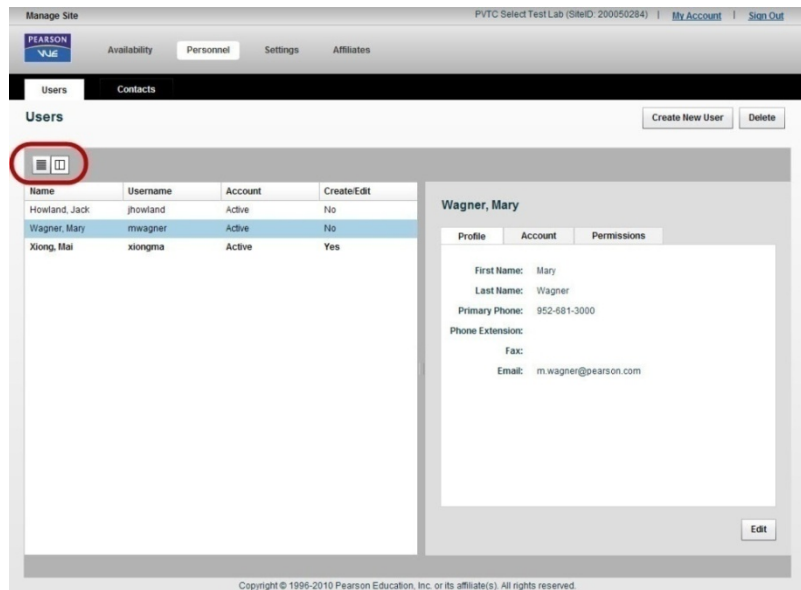
1.) Balance and hover the mouse on the right side of the pane until the image of the mouse pointer changes, as shown below.



2.) Click and drag to the left until the Detailed View pane expands, as shown below.



Selecting the Detailed View icon (right icon) above the **Name** column if a user is already selected in the list (see the image below). Selecting the List View icon (left icon) hides the pane.



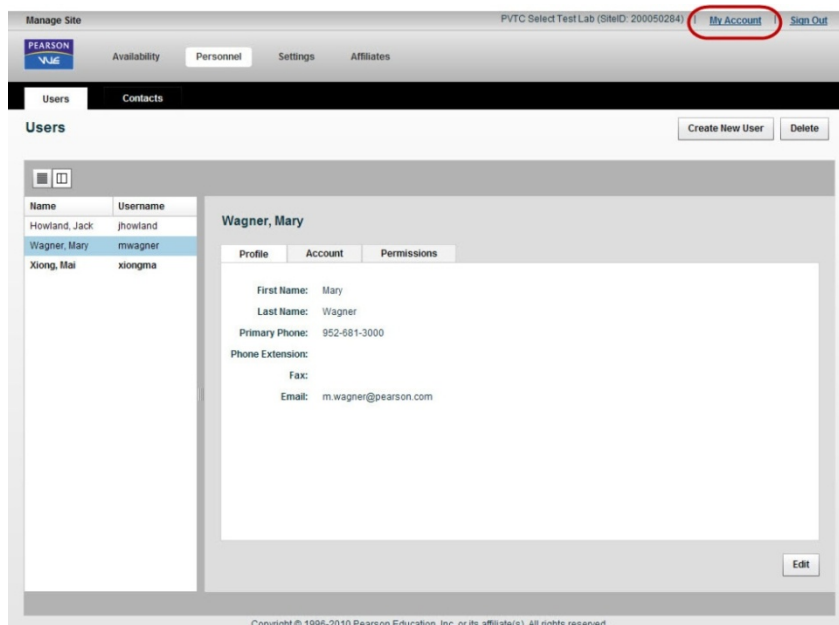
There are three tabs you can view in the Detailed View pane:

- **Profile** -- Provides general information about the user, such as the user's name, phone number and email.
- **Account** -- Provides login information, such as the user's username, password, and security questions. You can also lock/unlock a user's account in this tab.
- **Permissions** -- Provides information about what permissions are enabled for the user's account in each application.

To edit user account information, you must have the **May create and edit (other) users** permission assigned to your account as described in this section. Only one user will be able to have the **May create and edit (other) users** permission. If your account does not have this permission, you can view existing account information but cannot create, edit, or delete user accounts. However, you can edit passwords or unlock accounts in the **Account** tab if you have the **May reset passwords and lock/unlock user accounts** permission.

Clicking the **My Account** link located at the top right side of the screen is a quick way to access your user account information in the **Users** tab.





## About permissions

The **Permissions** tab in the Detailed View pane allows you to view what permissions are enabled for a selected user's account. The permissions are sorted by application and are self-explanatory. If a check box is selected, the user has permission to use that application or perform that function in the application.

If you have the **May create and edit (other) users** permission, you can edit the permissions for each user. You can also create a new user which requires you to set permissions for the new account.

Note the following when creating a user account or editing the permissions for a user:

- ❖ The **May admit candidates and deliver exams** permission allows you to use all features available in the Delivery Manager and Admissions Manager applications. It also allows you to reprint score reports.
- ❖ You cannot change your own permissions or other users' permissions unless the **May create and edit (other) users** permission is selected for your account. **Only one user at a site is allowed to have this permission.** You also cannot assign the permission to another user even if you have the **May create and edit (other) users permission** assigned to your account. In order to change the user for this permission, you must contact VSS.
- ❖ The **May edit software update retrieval schedule** permission allows users to establish rules to *modify* the default retrieval schedule or to disable background retrieval. This should only be done with direction from VSS.

- ❖ If you select the **May use the VSS web application** permission for a user, he or she can use the *same* username and password to log in to both the Pearson VUE Testing System applications and the VSS web site. This allows you to control which of your ITC's users have access to the VSS site. Note that the default name and password (admin, admin) cannot be used to log in to the VSS web site.
- ❖ If the user is not a test administrator, the only permission he or she can have is **May use the VSS web application**.
- ❖ The **May use Updater application** permission allows you to use the **Start Manual Update** application.
- ❖ You must have the **May use the Site Manager application** permission assigned to your account in order to use Site Manager. Test administrators who do not have the permission can only view the **Edit User: Account** screen after signing in to change their password and security questions. They will not have full access to the Site Manager application.

Also, a client security certificate is required in order to access the URL to Site Manager. Each test administrator must apply for and install a client security certificate for each web browser and workstation that he/she uses to access Site Manager.

## Creating a user account

Your ITC is required to create individual accounts for each user of the testing system applications. Do not create generic accounts that are shared among users. In many cases, it is important to know exactly which user performed a specific task in the system.

To create a user account, you must have the **May create and edit (other) users** permission assigned to your account.

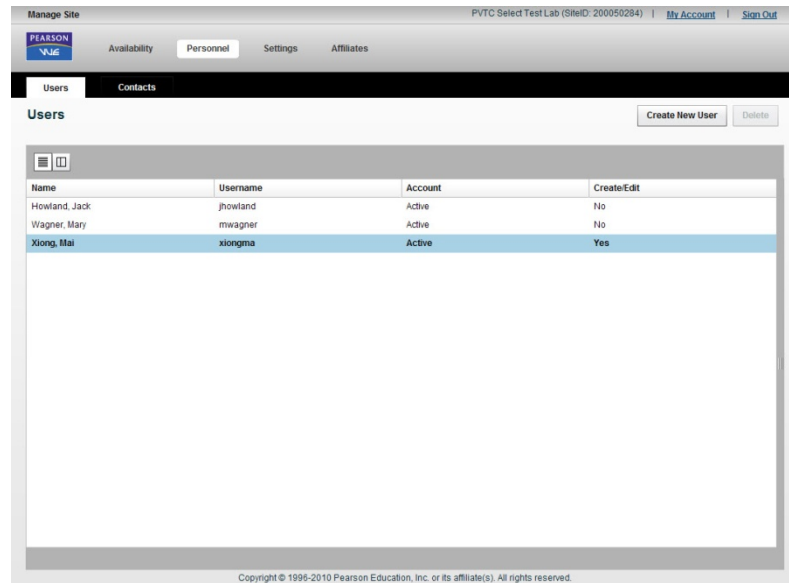
Follow the steps below to create a new user account:

1. **Have the new user request a Client Security Certificate if the user does not already have a certificate.**

A client security certificate is required in order to access the URL to Site Manager, and the new user will need to access Site Manager in this process.

2. **Once the user has been issued a Client Security Certificate, continue onto step 3.**
3. **In Site Manager, click on the Personnel category, and then click the Users tab.**

The **Users** tab displays a list of user accounts already defined at your ITC.



**4. Click the Create New User button.**

The **Create User: Step 1 of 3** screen appears with the first step in the process as shown below. You must provide the required information in each step to create the user account.

**Create User: Step 1 of 3**

1. Profile ▶ 2. Account ▶ 3. Permissions

First Name: \*

Last Name: \*

Primary Phone: \*

Phone Extension:

Fax:

Email: \*

\* = Field is Required

[Cancel](#) [Next](#)

**5. Enter the appropriate information in each box for Step 1.**

You are required to provide the user's **First Name**, **Last Name**, **Primary Phone**, and **Email**. A red star is located next to each required field.

**6. Click the Next button to continue.**

The **Create User: Step 2 of 3** screen appears.

**7. In the Username box, type the username.**

This is the name the user will use to sign in to all Pearson VUE Testing System applications to which he or she is given access. The username must be unique for the ITC. It should resemble the user's actual name by giving his or her first initial and full last name. For example, the username for Mary Wagner would be the following:

mwagner

**8. Click the Next button to continue.**

The **Create User: Step 3 of 3** screen appears.

You can also click the **Back** button to return to the first or second steps in order to modify any information that you provided in those screens.

**9. Select the permissions that the user is allowed to have for each application.**

If a box is selected, the user has permission to use that application or perform that function in the application.

**10. Click the Next button to continue or click the Back button to modify the previous steps.**

You can also click **Cancel** at any time in the Create User screens to discard the changes you made.

After you click **Next** in the third step, the user account is created and a message appears telling you to ask the user to sign in to Site Manager using the provided username and password on the screen.

Make sure to write down the provided username and password. If you lose this information, you can reset the password for the new user.

**11. Click OK.**

The new user account now appears on the list in the **Users** tab. In the **Account** column, “Expired Password” displays because the user needs to sign in to Site Manager to create a new password and security questions. The account status will change to “Active” once the user provides this information.

**12. If the user has been issued a Client Security Certificate, have the user sign into Site Manager to create a new password and security questions.**

A certificate window will appear on the screen asking the user to choose a certificate. The user must select the client security certificate issued to him/her, and then click **OK**.

If the user does not have a client security certificate, then have the user request a certificate.

When the user signs in to Site Manager for the first time with the generated password, the **Edit User: Account** screen will appear as shown below. This is where the user needs to create a new password and provide security questions before entering Site Manager for the first time.

**Edit User: Account**

Your account's password has expired. Please enter a new password.

Username: mwagner

Old Password: \*

New Password: \*

Confirm Password: \*

Security Question: \*

Answer: \*

Security Question: \*

Answer: \*

\* = Field is Required

[Cancel](#) [Save](#)

Test administrators who *do not* have the **May use the Site Manager application** permission can only view the **Edit User: Account** screen after signing in to change their password and security questions. They will not have full access to the Site Manager application.

## Editing a User Account

To edit a user account, you must have the **May create and edit (other) users** permission assigned to your account.

Follow the steps below to edit a user account:

1. In Site Manager, click on the **Personnel** category, and then click the **Users** tab.

The **Users** tab displays a list of user accounts already defined at your ITC.

2. Select the user from the list. Once the user is selected, the Detailed View pane displays.

Manage Site PVTC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

**PEARSON** **VIEW** Availability Personnel Settings Affiliates

**Users** Contacts Create New User Delete

Name	Username
Howland, Jack	jhowland
Wagner, Mary	mwagner
Xiong, Mai	xiongma

**Wagner, Mary**

Profile Account Permissions

First Name: Mary  
 Last Name: Wagner  
 Primary Phone: 952-681-3000  
 Phone Extension:  
 Fax:  
 Email: m.wagner@pearson.com

[Edit](#)

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By default, the **Profile** tab is displayed in the Detailed View pane.

3. **Select the tab in the Detailed View pane with the information you want to edit, and then click the Edit button located at the bottom right side of the pane.**

An **Edit User** screen appears.

4. **Edit the necessary information.**

A red star is located next to each box that requires information. You cannot save any changes if any of these boxes are left blank.

5. **Click Save.**

The changes are saved, and the information is updated in the tab.

## Locking or unlocking a user account

A user can be prevented from signing in to any application without deleting the user's account. To lock/unlock a user account, you must have the **May create and edit (other) users** or **May reset passwords and lock/unlock user accounts** permission assigned to your account. There will be two people at the ITC with the ability to reset passwords/unlock accounts. You can not lock/unlock your own account.

**Follow the steps below to lock a user account:**

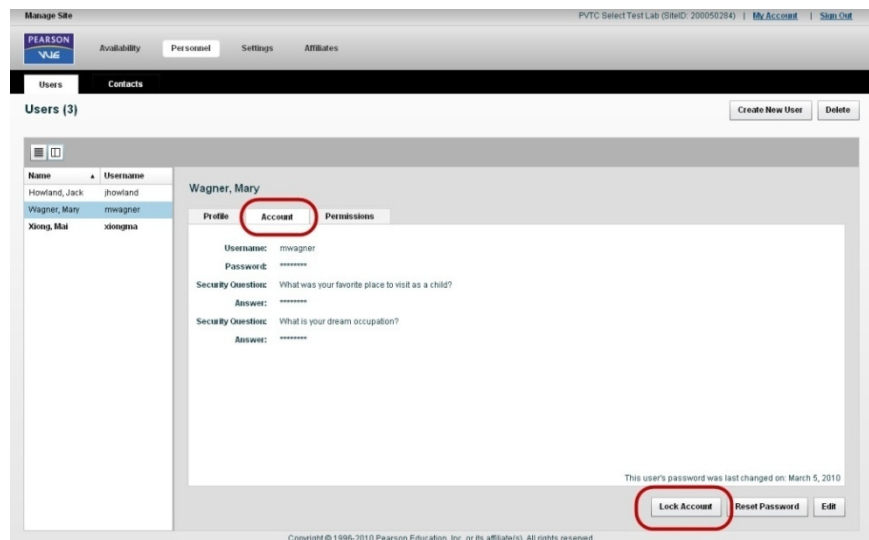
1. **In Site Manager, click on the Personnel category, and then click the Users tab.**

The **Users** tab displays a list of user accounts already defined at your ITC.

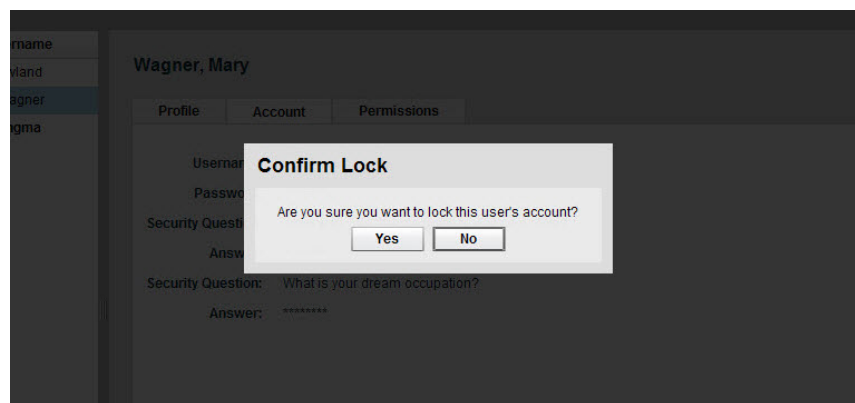
2. **Select the user from the list.**

Once the user is selected, the Detailed View pane displays.

3. **Select the Account tab on the Detailed View pane, and then click the Lock Account button located at the bottom of the pane.**



A message appears asking you to confirm that you want to lock the user's account.



#### 4. Click Yes.

The user account is now locked.

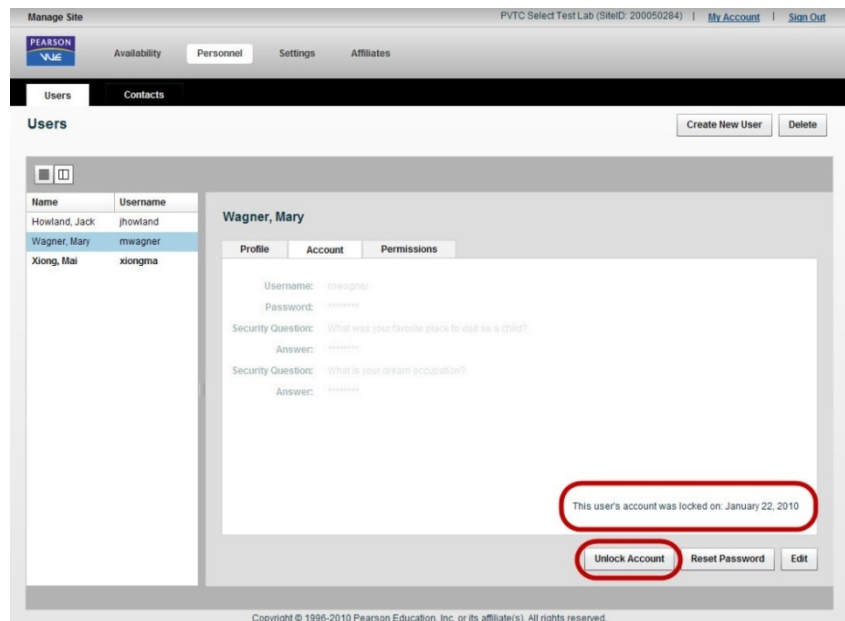
On the list in the **Users** tab, the **Account** column displays “Locked” for the user.

On the **Account** tab in the Detailed View pane for the user, you will now see the following information:

- The date when the account was locked.



- The **Unlock Account** button located at the bottom of the pane (Before locking, it was the **Lock** button).



A test administrator's account is locked after he or she tries to login three times and is unsuccessful. He or she should contact one of the users with the permission to reset passwords/unlock accounts, for example the Chief administrator. If they are unavailable, Channel Quality or VSS may be contacted to unlock an account.

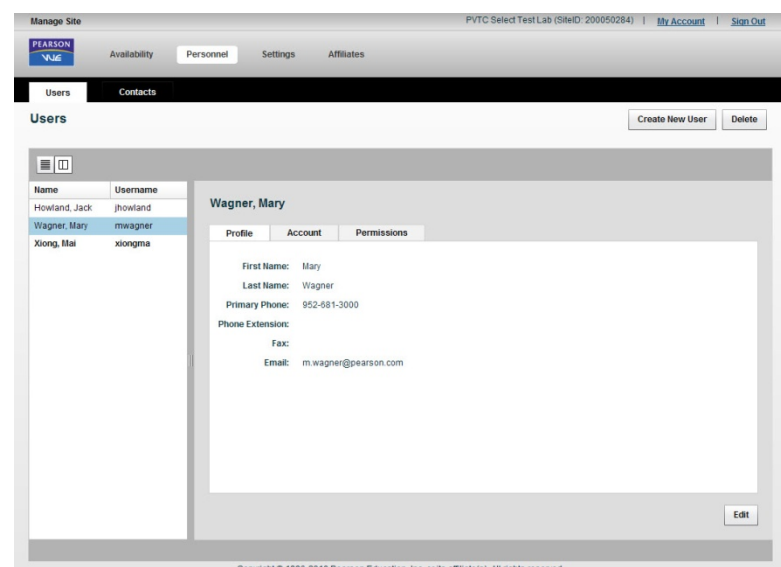
**To unlock a user account, follow the steps below:**

1. In Site Manager, click on the **Personnel** category, and then click the **Users** tab.

The **Users** tab displays a list of user accounts already defined at your ITC.

2. **Select the user from the list.**

Once the user is selected, the Detailed View pane displays.



3. Select the Account tab on the Detailed View pane, and then click the Unlock Account button located at the bottom of the pane.

The screenshot shows the 'Manage Site' interface with the 'Users' section selected. A table on the left lists users: Howland, Jack (jhowland), Wagner, Mary (mwagner), and Xiong, Mai (xiongma). The 'Wagner, Mary' user is selected. The 'Account' tab is active, showing fields for Username (mwagner), Password (password), and two Security Questions: 'What was your favorite place to visit as a child?' (Answer: park) and 'What is your dream occupation?' (Answer: singer). A message states 'This user's account was locked on: January 22, 2010'. The 'Unlock Account' button is highlighted with a red circle.

The **Unlock Account** screen appears.

The 'Unlock Account' dialog box is shown. It contains the following text: 'In order to unlock the account, please verify the user's identity by using the security questions below.' It lists two security questions with their answers: 'What was your favorite place to visit as a child?' (Answer: park) and 'What is your dream occupation?' (Answer: singer). Below these, there are two radio button options: 'User has validated the security questions' (selected) and 'Override security question validation'. A legend at the bottom left indicates '\* = Field is Required'. The 'Unlock Account' button is highlighted.

4. Ask the user the security questions on the screen.
5. Once the user gives the correct answers, select the "User has validated the security questions" option.
6. Click **Unlock Account**.

The user's account is now unlocked.

## Resetting passwords

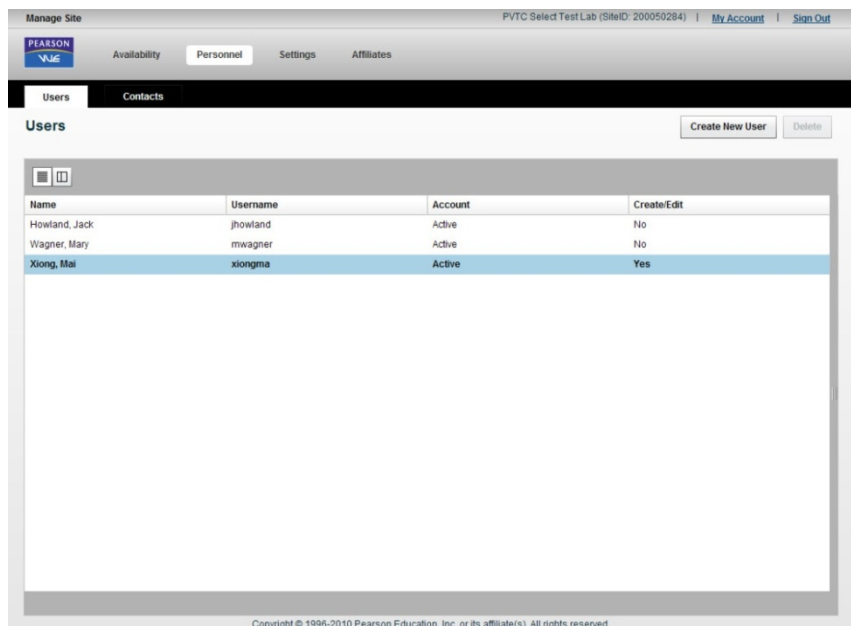
Passwords can be reset from within Site Manager. If a test administrator forgets his or her password, he or she must contact one of the users with the permission to reset passwords/unlock accounts in order to have a new password generated for the account. If they are unavailable, the test administrator may also call Channel Quality or VSS to have the password reset.

To reset passwords, you must have the **May create and edit (other) users** or **May reset passwords and lock/unlock user accounts** permission assigned to your account. There will be two people at the ITC with the ability to reset passwords/unlock accounts. You can not reset your own password. However, you may edit your password.

Follow the steps below to reset a user's password:

1. **In Site Manager, click on the Personnel category, and then click the Users tab.**

The **Users** tab displays a list of user accounts already defined at your ITC.



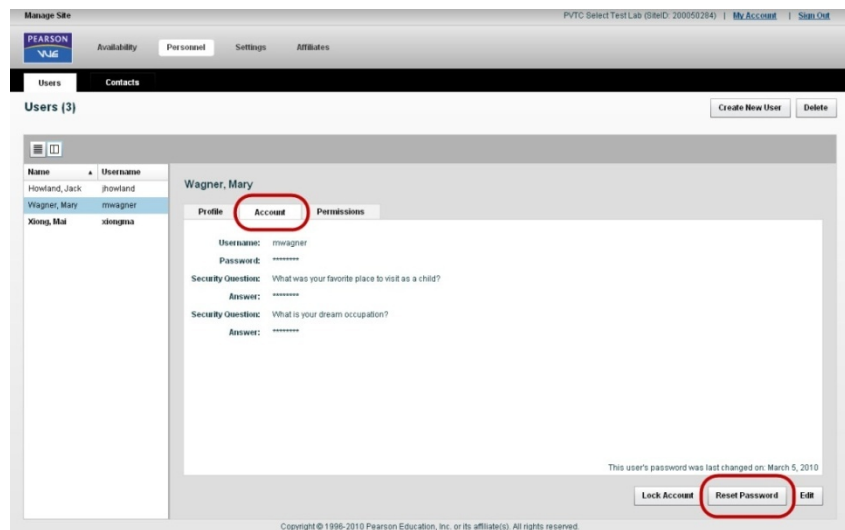
The screenshot shows the 'Manage Site' interface with the 'Personnel' category selected. The 'Users' tab is active, displaying a table of user accounts. The table has four columns: Name, Username, Account, and Create/Edit. Three users are listed: Howland, Jack (jhowland, Active, No), Wagner, Mary (mwagner, Active, No), and Xiong, Mai (xiongma, Active, Yes). The Xiong, Mai row is highlighted in blue. There are 'Create New User' and 'Delete' buttons at the top right of the table area. The footer indicates copyright © 1996-2010 Pearson Education, Inc. or its affiliate(s). All rights reserved.

Name	Username	Account	Create/Edit
Howland, Jack	jhowland	Active	No
Wagner, Mary	mwagner	Active	No
Xiong, Mai	xiongma	Active	Yes

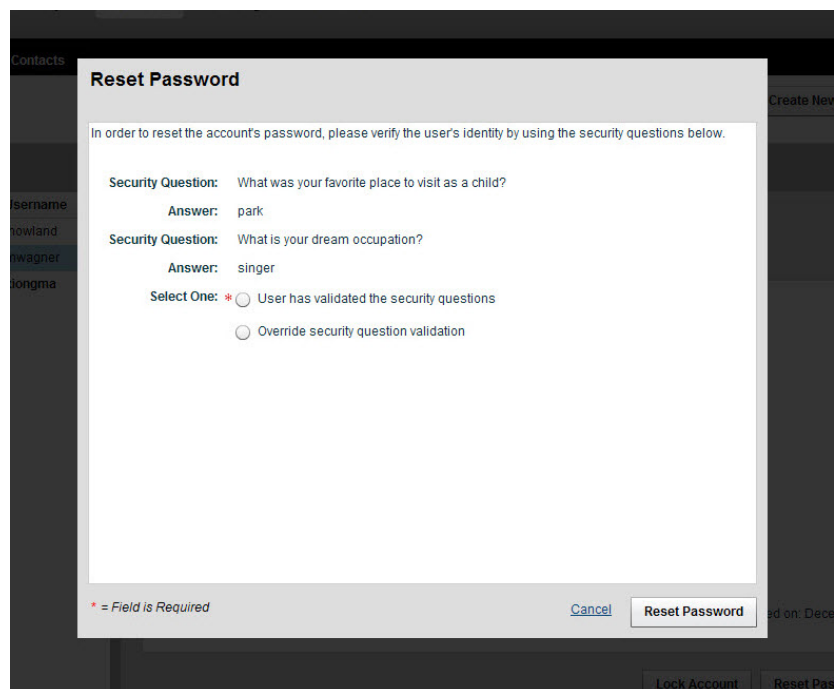
2. **Select the user from the list.**

Once the user is selected, the Detailed View pane displays.

3. Select the **Account** tab in the Detailed View pane, and then click the **Reset Password** button located at the bottom of the pane.



The **Reset Password** screen appears.



4. Ask the user the security questions on the screen.
5. Once the user gives the correct answers, select the "User has validated the security questions" option.
6. Click **Reset Password**.

A message appears telling you to ask the user to sign in to Site Manager using the provided username and password on the screen.

Make sure to write down the provided username and password. If you lose this information, you can reset the password for the new user again by following the previous steps.

7. Click OK.
8. Have the user sign in to Site Manager with the generated password.

When the user signs in to Site Manager with the generated password, the **Edit User: Account** screen will appear as shown below. The user needs to create a new password before entering Site Manager.

## Deleting a user account

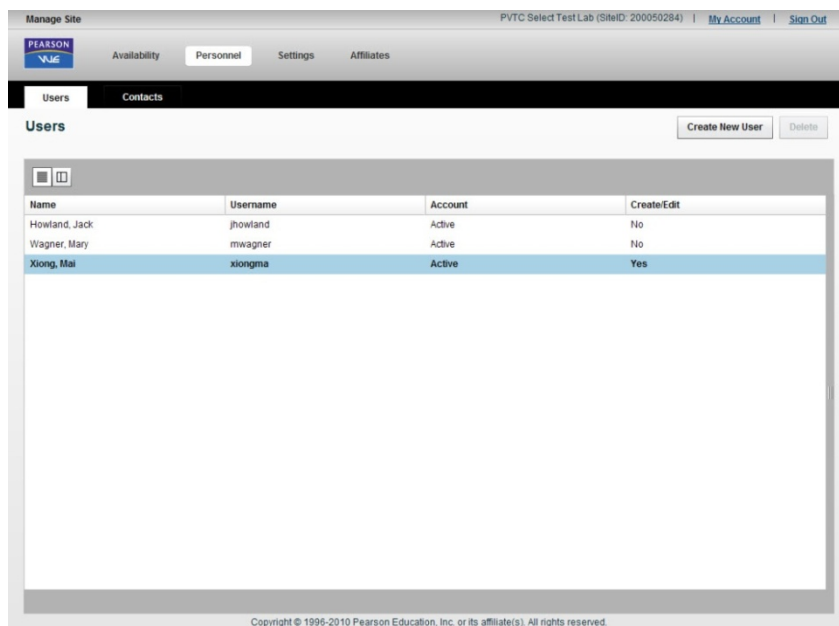
You can delete user accounts from within Site Manager. Keep in mind that, once you delete an account, that user will no longer be able to use any of the Pearson VUE Testing System applications. To delete a user account, you must have the **May create and edit (other) users** permission assigned to your account.

If a user leaves your ITC or will no longer be using the testing system applications, delete his or her account as described in this section.

You can not delete a user's account if the user is assigned as a contact in the **Contacts** tab under the **Personnel** category. You must assign a different user for the contact before you can delete the account.

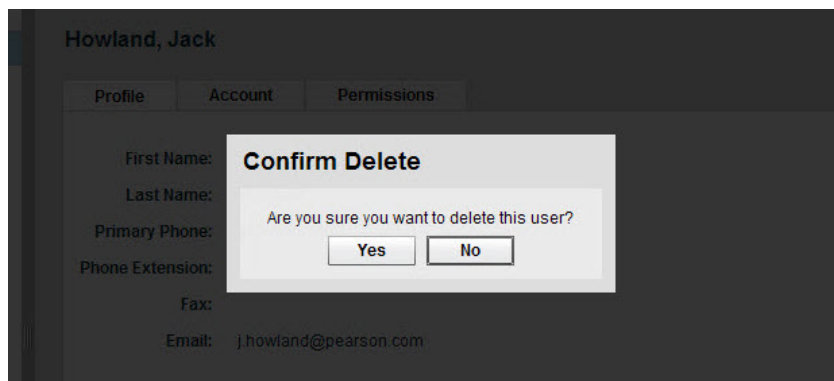
Follow the steps below to delete a user account:

1. In Site Manager, click on the **Personnel** category, and then click the **Users** tab.
2. The **Users** tab displays a list of user accounts already defined at your ITC.



3. Select the user from the list.
4. Click the **Delete** button.

The following message appears asking you to confirm the deletion.



Another message may appear instead explaining that the account cannot be deleted because the user is configured as a contact. Click **OK**. You must assign a different user for the contact before you can delete the account.

5. Click **Yes**.

The user account is deleted from the database, and his or her name is removed from the list in the **Users** tab.

6. Make sure to remove the user's client security certificate from the administration workstation(s) where the user had access to Site Manager.

## Setting up contacts

The **Contacts** tab under the **Personnel** category in Site Manager provides general information about your ITC and indicates who should be contacted for specific information. Follow the steps below to make changes to the **Contacts** tab:

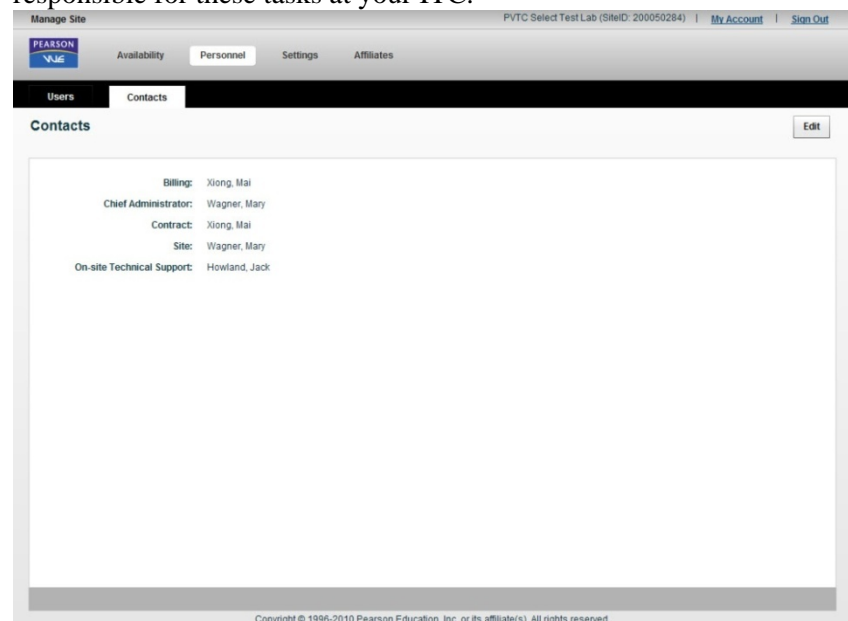
The contacts to choose from for each job responsibility are predefined. Before you can assign ITC staff as contacts for each job responsibility, they must have an active account set up in Site Manager.

You cannot delete a user's account if the user is assigned as a contact. You must assign a different user for the contact before you can delete the account.

Your ITC is *required* to keep the list of contacts in Site Manager up to date.

1. In Site Manager, click on the **Personnel** category, and then click the **Contacts** tab.

The **Contacts** tab displays the job responsibilities and people responsible for these tasks at your ITC.



2. Click the **Edit** button located on the left side of the screen.

The **Edit Contacts** screen appears.

3. **Select the person to contact for each job responsibility using the drop-down lists.**

You are required to select a contact for Billing.

The contacts in the drop-down lists are predefined and cannot be changed in the **Edit Contacts** screen. Before you can assign ITC staff for each job responsibility, you must enter their information in the **Users** tab under **Personnel**.

4. **Click Save to confirm your changes or click Cancel to discard the changes you made.**

The list is updated in the **Contacts** tab.

## Setting up software retrieval (Updates tab)

The **Updates** tab under the **Settings** category in Site Manager allows RMA to retrieve available software update files from the hub while the ITC is closed. **Only users with the “May edit software update retrieval schedule” permission may change or update the software retrieval schedule.**

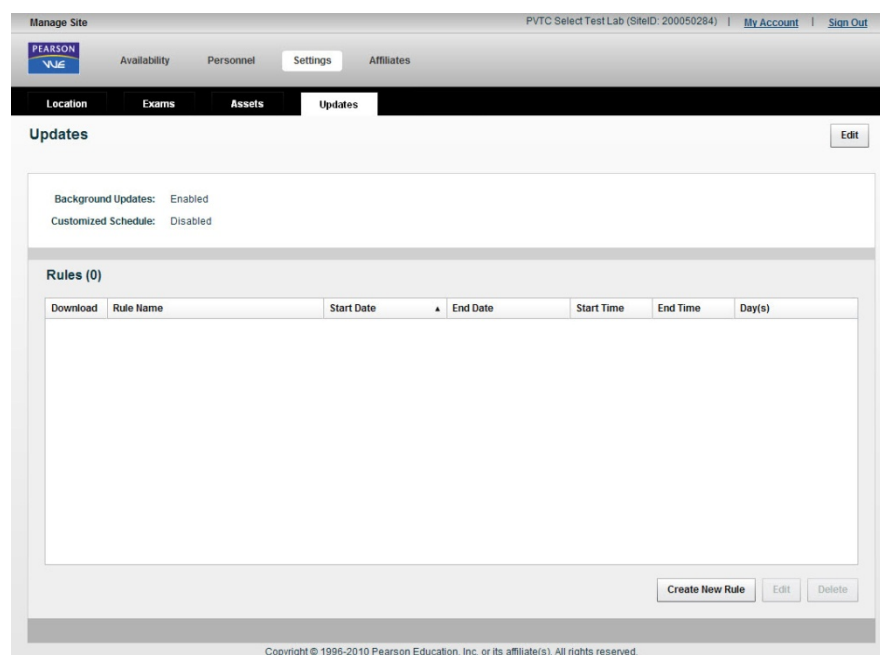
By default, retrieving updated software is a low-priority task for RMA that is only performed when the ITC is closed. The default schedule can be modified by adding rules to the software retrieval schedule. The software retrieval can only be performed when RMA is not performing other tasks, such as running a maintenance cycle, preparing events, uploading results, etc.



Rules can be added to *modify* the default retrieval schedule, but they do not completely replace the default schedule. For instance, a rule may be added that allows retrieval to occur when the ITC is open but during specified time periods when RMA is not performing other tasks. Rules can also be added to disallow background retrieval which prevents retrieval at specified times, even if the ITC is closed at those times.

Test administrators also have the ability to disable background retrieval. Running RMA and auto update can be done manually if background retrieval is disabled.

To access the **Updates** tab, click the **Settings** category in Site Manager, and then select the **Updates** tab. The **Updates** tab displays whether Background Updates or Customised Schedule are enabled or disabled and lists any rules that are set up for the update retrieval.



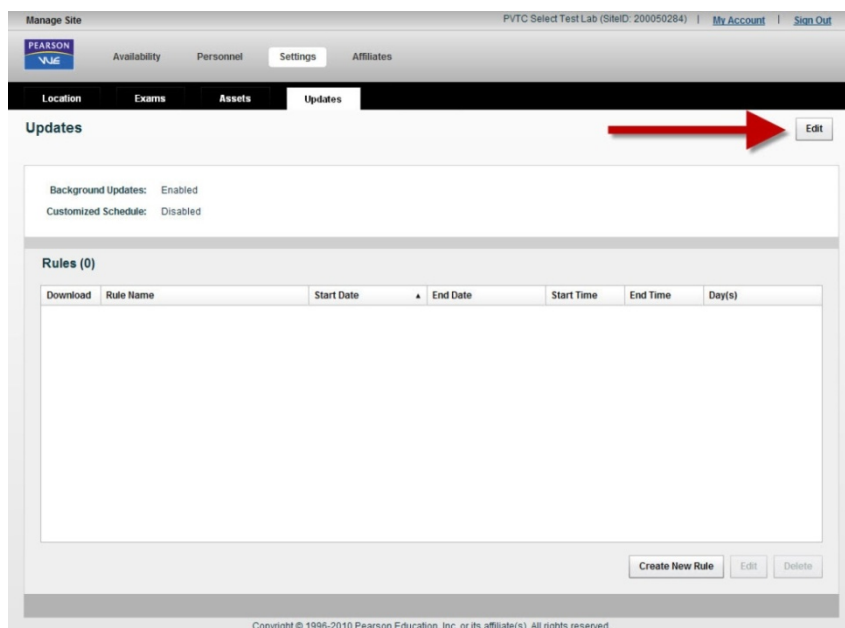
There are three options the test administrator may choose to apply for background updates:

## Option 1 - Disabling the background updates

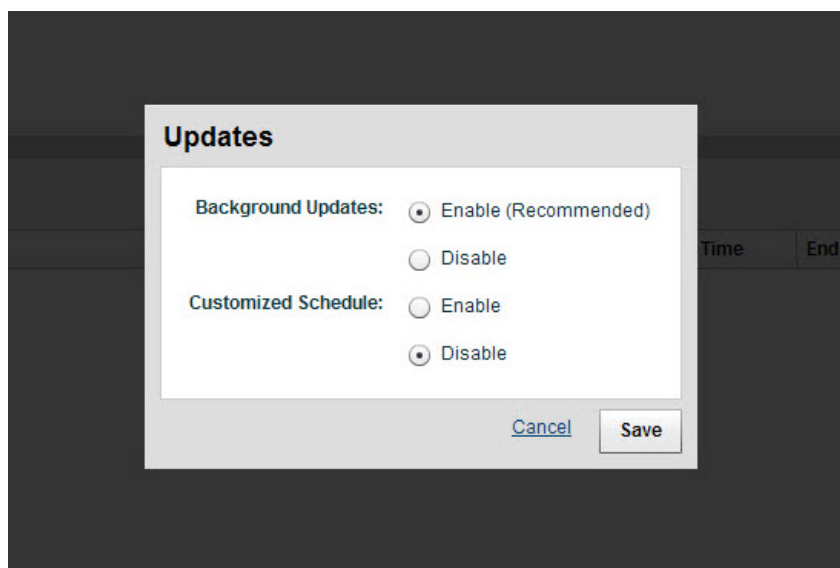
Test administrators also have the ability to disable background retrieval. Running RMA and auto update can be done manually if the background retrieval is disabled.

To disable the background updates, follow the steps below:

1. In Site Manager, click on the **Settings** category, and then click the **Updates** tab.
2. Click the **Edit** button.



The **Updates** screen appears.



3. Select “Disable” for the Background Updates option.
4. Click Save.

The Background Updates retrieval is now disabled.

## Option 2 - Leaving the background updates retrieval schedule at default

You can leave the background updates retrieval at the default setting. By default, the background updates are enabled and the customised schedule is disabled. This setting allows RMA to retrieve updated software when the ITC is closed.

The default schedule downloads the update when the following two conditions are met: the site is closed and RMA is not performing any other tasks (e.g., preparing tests or uploading results).

## Option 3 - Modifying the default background updates schedule with rules

Test administrators can modify the default schedule by either subtracting or adding windows when RMA can download the update, regardless of whether the ITC is open or closed. This is done by creating and defining rules.

**Modifying the default schedule should only be done under the direction of VSS.**

To create or edit a rule in order to modify the default schedule, follow the steps below:

1. **In Site Manager, click on the Settings category, and then click the Updates tab.**

The **Updates** tab displays.

The screenshot shows the 'Updates' tab in the Site Manager interface. At the top, there's a navigation bar with 'Manage Site' and 'PEARSON VUE' logo. Below it, there are tabs for 'Availability', 'Personnel', 'Settings', and 'Affiliates'. The 'Settings' tab is active, and within it, the 'Updates' sub-tab is selected. The 'Updates' section shows 'Background Updates: Enabled' and 'Customized Schedule: Disabled'. Below this, there's a section titled 'Rules (0)' with a table that has columns: 'Download', 'Rule Name', 'Start Date', 'End Date', 'Start Time', 'End Time', and 'Day(s)'. The table is currently empty. At the bottom right of the rules section, there are buttons for 'Create New Rule', 'Edit', and 'Delete'. The footer of the page contains the copyright notice: 'Copyright © 1996-2010 Pearson Education, Inc. or its affiliate(s). All rights reserved.'

2. **Enable the Customised Schedule if it is disabled.**

By default, the **Background Updates** is enabled and the **Customised Schedule** is disabled as shown below.

Manage Site P/TC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

PEARSON VUE Availability Personnel Settings Affiliates

Location Exams Assets Updates

Updates [Edit](#)

Background Updates: Enabled  
Customized Schedule: Disabled

Rules (0)

Download	Rule Name	Start Date	End Date	Start Time	End Time	Day(s)

[Create New Rule](#) [Edit](#) [Delete](#)

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You can create rules to modify the schedule even though the Customised Schedule is disabled. However, the rules **DO NOT** activate at your ITC unless the Customised Schedule is enabled.

**To enable the Customised Schedule:**

**A. In the Updates tab, click the Edit button.**

Manage Site P/TC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

PEARSON VUE Availability Personnel Settings Affiliates

Location Exams Assets Updates

Updates [Edit](#)

Background Updates: Enabled  
Customized Schedule: Disabled

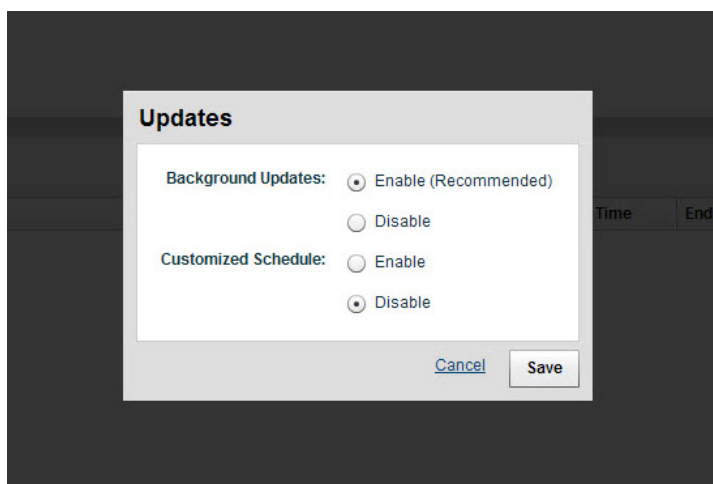
Rules (0)

Download	Rule Name	Start Date	End Date	Start Time	End Time	Day(s)

[Create New Rule](#) [Edit](#) [Delete](#)

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The **Updates** screen appears.

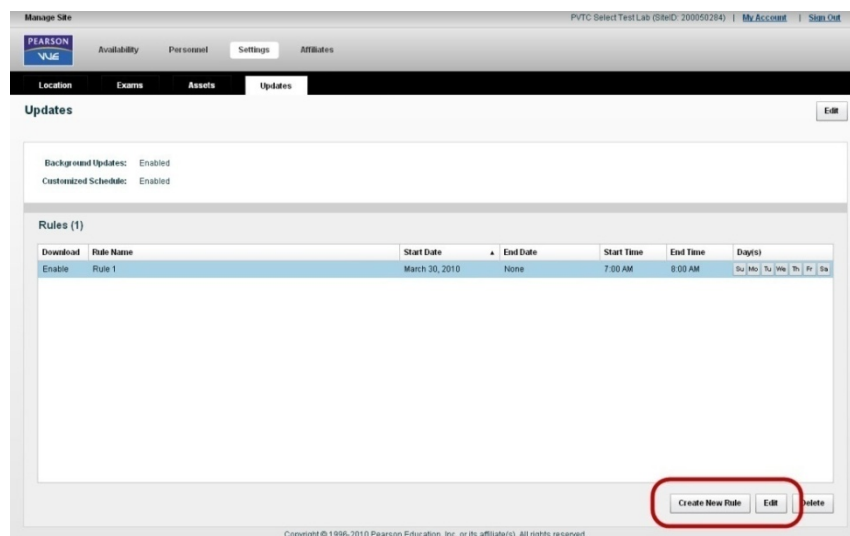


**B. Select “Enable” in the Customised Schedule option.**

**C. Click Save.**

The **Customised Schedule** is now enabled.

- 3. To create a new rule, click the Create New Rule button located at the bottom of the screen. To edit an existing rule, select the rule first, and then click the Edit button located at the bottom of the screen.**



The **Create Rule** or **Edit Rule** screen appears.

4. Type in the rule name in the Name box.
5. Select **Enable** in **Download** option if the rule will allow RMA to download updates, or select **Disable** if the rule will not allow RMA to download updates.

By default, **Enable** is selected.

6. In the **Start date** and **End Date** boxes, type or select a date for when the rule begins and ends.

By default, the current date is automatically entered in the **Start Date** and **End Date** boxes. You must enter the date range for when the rule applies or select the **No End Date** check box.

You can enter dates in one of the following formats:

1/1/10  
January 1, 2010  
Jan 1, 2010

You can also click the Calendar icons next to the **Start Date** and **End Date** boxes to select a date from a monthly calendar view.

7. In the **Start Time** and **End Time** boxes, type or select a time for when the rule applies during the day.

You can select the times from the drop-down list or you can enter the times in one of the following formats in quarter-hour intervals, such as 8:00, 8:15, 8:30 (if the **All Day** option is not selected):

8:30 am\*  
4:30 pm\*  
16:00

\* You should specify a.m. or p.m. If you do not, then military time is assumed, and the time automatically changes to a.m. or p.m. accordingly.

You cannot select **All Day** if **Enable** was selected in step 5. This option is only available for rules that do not allow RMA to download updates.

**8. In the Day(s) check boxes, select the days during the week for when the rule applies.**

By default, all the days of the week are selected. A check mark in a box indicates that the rule is in effect on that day. If the rule applies on all days of the week, then leave all the days selected.

The days of the week must fall within the specified date range. If you entered a start and end date that covers a date range of less than one week, you must select at least one day of the week that occurs in the date range you specified.

**9. Click Save to confirm your changes or click Cancel to discard the changes you made.**

Various messages may display if you do not provide all the required information after clicking **Save**.

A message may appear asking you to confirm the rule creation if you set up the rule in the following situations:

- The rule disables the background update retrieval for the next 45 days or longer.
- The rule coincides with another existing rule.

After you respond to any messages that appear, the rule is listed in the **Updates** tab.

- It may take several minutes for RMA to notice that background retrieval has been enabled or disabled using the **Yes/No** option buttons at the top of the **Updates** tab.
- Changes to the background retrieval schedule take effect when the user navigates away from the **Updates** tab or by closing Site Manager.
- VSS can remotely disable updates temporarily, if necessary, to deal with service issues.

## Specifying your ITC's assets

*Assets* are the resources needed to deliver a test to a candidate. These include the applications used as part of the testing process and supporting materials such as the web cam and epad.

When you display the **Assets** tab, all assets for your ITC are listed as shown below. The list includes information on the asset name and the number of workstations the asset applies to in the **Count** column.

Manage Site PVTCL Select Test Lab (SiteID: 200050284) My Account Sign Out

PEARSON VUE Availability Personnel Settings Affiliates

Location Exams Assets Updates

Assets (21) Create New Asset Edit Delete

Name	Count
▶ 2.3.711 Asset	All
▶ 2.3.808 Min Version (STx Fix)	All
▶ 5.08 Test Driver	All
▶ 5.6 Test Driver	All
▶ Athena TD VTS 2.3.708	All
▶ Athena TD VTS 2.3.803	All
▶ Athena TD VTS 2.3.806 (STx Fix)	All
▶ Athena TD VTS 2.3.811	All
▶ Athena TD VTS 2.3.903	All
▶ Athena TD VTS 2.3.906	All
▶ Athena TD VTS 2.3.910	All
▶ CCI Video	All
▶ Excelsior	All
▶ ICAEW - IFD Exam	All
▶ IIE 2.6.X	All
▶ LNAT Asset	All
▶ PVTCL 002.003.811.325	All
▶ PVTCL 002.003.811.328	All
▶ Siemens Simulation	All
▶ TDFT GMAT 506	All
▶ Video Camera	All

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You can sort the assets in ascending or descending order by any of the columns. To do this, select the column name once or twice and an arrow pointing up (ascending) or down (descending) appears with the column name. By default, the assets are sorted in ascending order by name. You can also expand the columns by clicking and dragging the right or left edge of the column name.

More details about an asset are also viewable by selecting the arrow in the asset Name (see the image below).

▶ PVTCL 002.003.811.325	All
▶ PVTCL 002.003.811.328	All
▶ Siemens Simulation	All
▶ TDFT GMAT 506	All
▼ Video Camera	All

This asset indicates the number of delivery workstations with a video camera installed for video monitoring and recording of candidates taking Professional exams.

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The workstations on which tests are delivered are managed separately from the assets.

## Creating and editing asset information

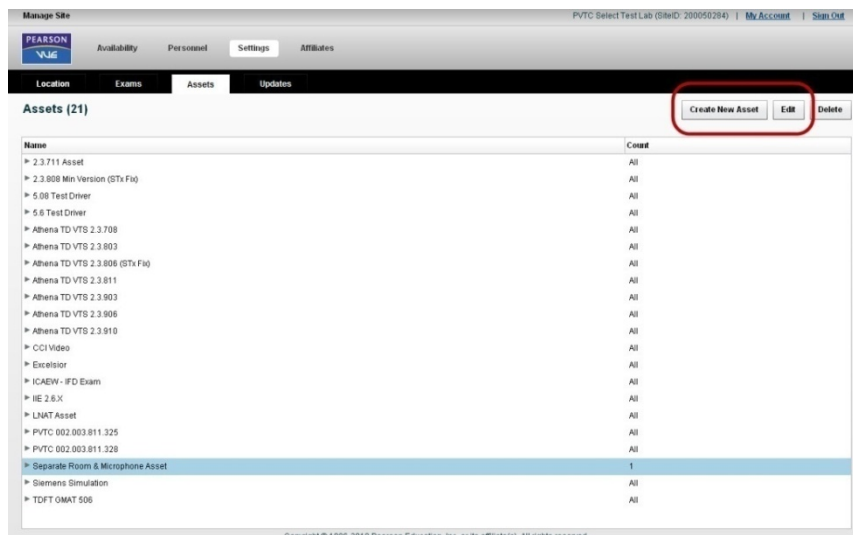
Follow these steps to create a new asset or to edit the information for an existing asset:

1. In Site Manager, click on the **Settings** category, and then click the **Assets** tab.

The **Assets** tab displays a list of assets defined at your ITC.

2. To create a new asset, click the **Create New Asset** button. To edit an existing asset, select the asset first, and then click the **Edit** button.





The **Create Asset** or **Edit Asset** screen appears. The example below shows the **Create Asset** screen.

The 'Create Asset' form is shown. It includes a description: 'When you add this asset, the specified count will be available for appointments during your site's hours of operations.' The 'Name' field is a drop-down menu, highlighted with a red box. The 'Description' field is empty. The 'Count' field is set to 0, and the 'All' checkbox is unchecked. The 'Cancel' and 'Save' buttons are at the bottom right.

3. Choose the asset from the Name drop-down list if you are adding a new asset.

After choosing the asset, a description about the asset appears below the asset name.

The 'Create Asset' form is shown with the 'Name' field set to 'Video Camera'. The 'Description' field is populated with the text: 'This asset indicates the number of delivery workstations with a video camera installed for video monitoring and recording of candidates taking Professional exams.' The 'Count' field is set to 0, and the 'All' checkbox is unchecked. The 'Cancel' and 'Save' buttons are at the bottom right.

If you are editing an asset, you cannot choose an asset in the drop-down list. The drop-down list is grayed out.

4. Type in how many workstations this asset applies to in the Count box under the Description. If the asset applies to all the workstations, select the "All" check box.

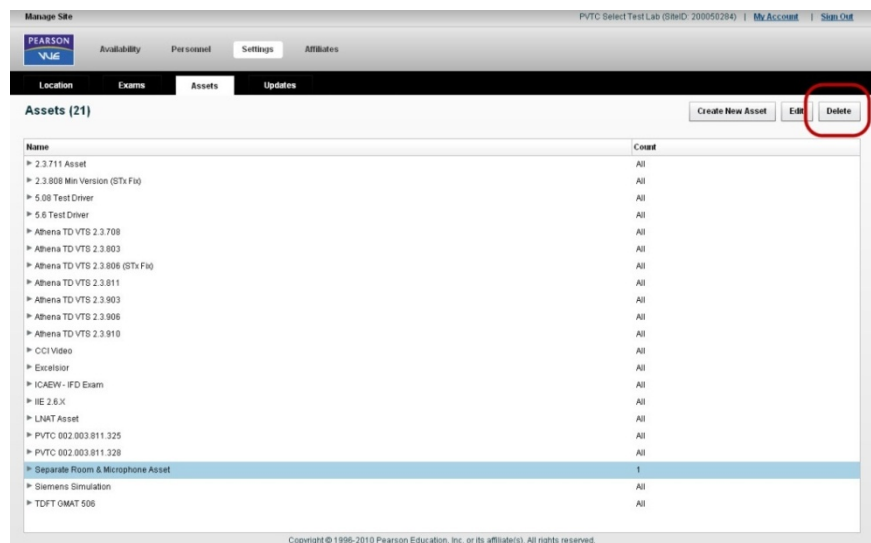
You must enter a count number. If not, the default number is zero.

5. Click **Save** to confirm your changes or click **Cancel** to discard the changes you made.

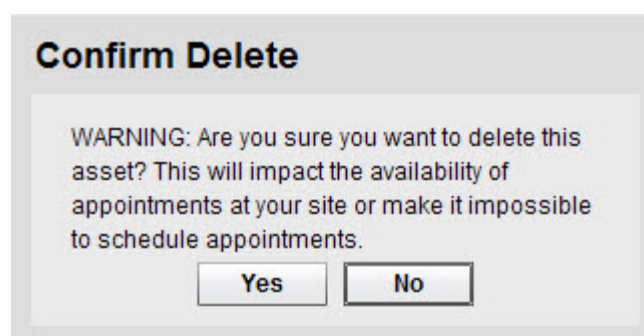
The asset appears in the list on the **Assets** tab after clicking **Save**.

## Deleting an asset

1. In the **Assets** tab under the **Settings** category, select the asset to remove from the system.
2. Click the **Delete** button.



The following message asks you to confirm that you want to delete the asset.



Site Manager will not allow you to delete an asset that is required for an active test (one that has been registered for but not yet taken). You will see a message if you try to delete an asset required for a scheduled test:

3. Click **OK**.

The asset is removed from the system and no longer appears in the list.

## Specifying your ITCs workstations

*Workstations* are the physical computers needed to deliver a test.

Keep in mind that the workstations you set up are tracked by the Pearson VUE Testing System and are used to determine whether or not a test can be scheduled at your ITC. Because a workstation can only be used by one candidate at a time, workstations must be tracked when scheduling for tests to prevent overbooking issues. For example, if you have set up 10 delivery workstations in Site Manager, Registration Manager will not allow more than 10 tests to be scheduled at your ITC simultaneously.

Therefore, it is very important to keep your list of workstations and workstation unavailability rules up-to-date.

The workstations on which tests are delivered are managed separately from the assets.

When you view the **Workstations** tab under the **Availability** category, a list of available workstations set up at your ITC is displayed.

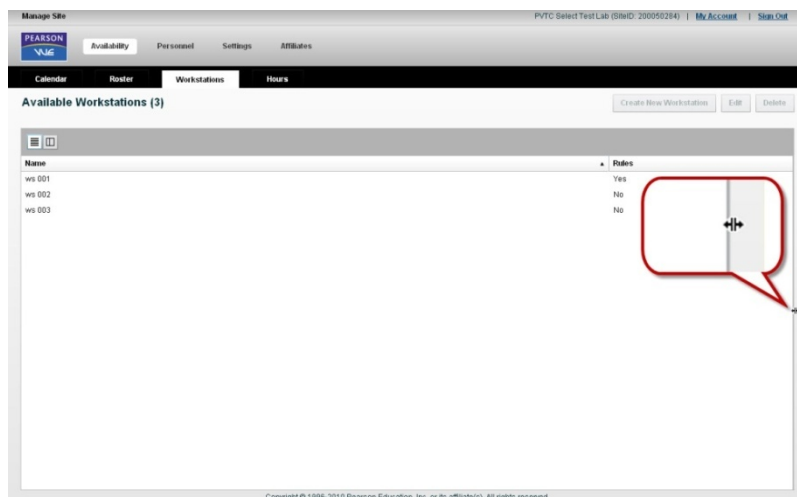
Name	Rules
ws 001	Yes
ws 002	No
ws 003	No

The list includes each workstation's name and a **Yes** or **No** in the **Rules** column to indicate if there are any unavailability rules for the workstation. You can sort the assets in ascending or descending order by any of the columns. To do this, select the column name once or twice and an arrow pointing up (ascending) or down (descending) appears with the column name. By default, the workstations are organised in ascending order by name. You can also expand the columns by clicking and dragging the right or left edge of the column name.

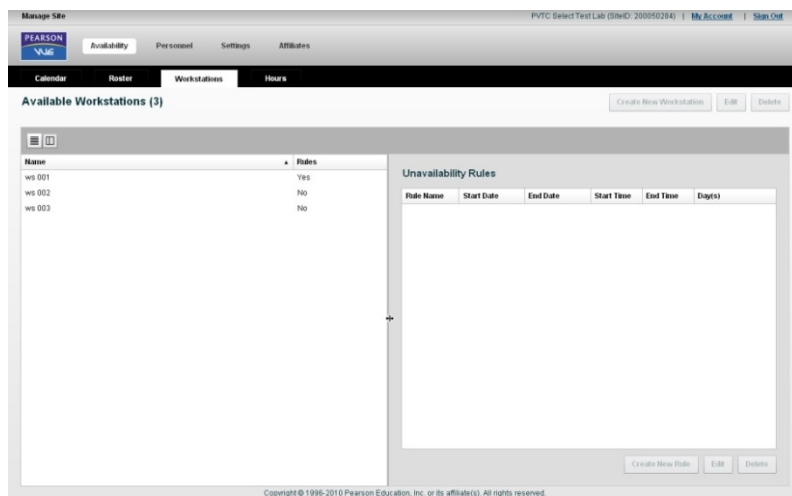
You can view more information about a workstation by displaying the Detailed View pane in one of the following ways:

- Selecting the workstation in the list.
- Balancing the mouse pointer on the right side of the pane, and then clicking and dragging to the left.

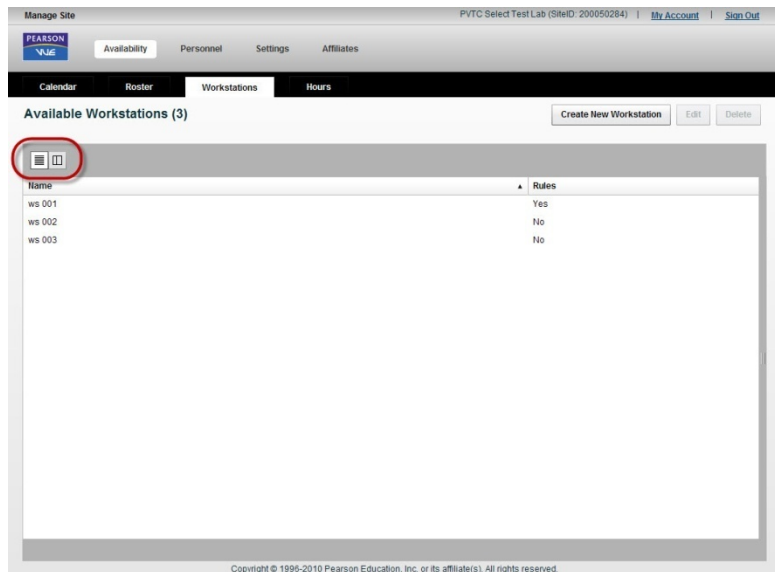
1.) Balance and hover the mouse on the right side of the pane until the image of the mouse pointer changes, as shown below.



2.) Click and drag to the left until the Detailed View pane expands, as shown below.



Selecting the Detailed View icon (right icon) above the **Name** column if the workstation is already selected. Selecting the List View Icon (left icon) hides the pane.



The Detailed View pane displays a list of all the unavailability rules for a selected workstation. The list includes information on the rule's name, start date, end date, start time, and end time and on what day(s) during the week the rules applies. **Note:** Workstation unavailability rules are removed weekly from Site Manager 93 days after the date of the rule is past. When it is removed, it is permanently deleted from the system and cannot be recovered. However, unavailability rules with no end dates are not removed and will remain in Site Manager.

## Creating or editing a workstation

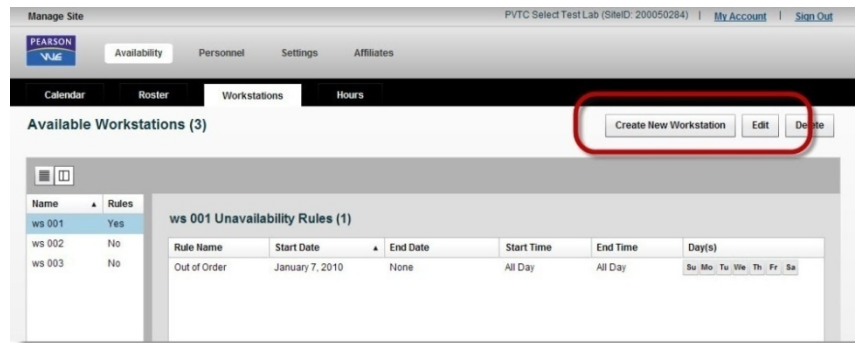
You must define each test delivery workstation in your ITC as a separate workstation. For example, if you have five delivery workstations, each one must be listed separately in Site Manager.

Follow the steps below to create a new workstation or to edit the information for an existing one:

1. **In Site Manager, click on the Availability category, and then click the Workstations tab.**

The **Workstations** tab displays a list of available workstations set up at your ITC.

2. **To create a new workstation, click the Create New Workstation button. To edit an existing workstation, select the workstation, and then click the Edit button located next to the Create New Workstation button.**



The **Create New Workstation** or **Edit Workstation** screen appears. Below is an example of the **Create New Workstation** screen.

The 'Create New Workstation' form has a title bar and a main content area. The content area contains a message: 'When you add this workstation, it will be available for appointments during the site's hours of operations unless unavailability rules are specified.' Below this is a text input field labeled 'Name:'. At the bottom right, there are 'Cancel' and 'Save' buttons.

### 3. Type the workstation name in the Name box.

You must enter a unique name for each workstation. Site Manager does not allow you to duplicate the name of another workstation. Pearson VUE recommends that you name your workstation assets consistently and logically.

For example, let's assume your ITC has five delivery workstations, and you typically refer to them as workstations one through five, going from left to right in your test room. In Site Manager, your workstations should be named to correlate with the way you refer to the workstations. In this example, you should name the assets workstation one through workstation five.

Pearson VUE recommends using "ws" followed by a three-digit workstation number. In this case, you would name the assets ws 001, ws 002, ws 003, ws 004 and ws 005. If you name your assets this way, they will be listed in numerical order in Site Manager.

### 4. Click **Save** to confirm your changes or click **Cancel** to discard the changes you made.

The workstation information is updated in the list on the **Workstations** tab.

## Creating or editing a workstation unavailability rule

It is assumed that workstations are available whenever your ITC is open. If a workstation is out of order or being used for another purpose, you can take it out of service by creating an *unavailability rule*. The workstation will not be scheduled for use when it is not available. For example, in the illustration below a workstation is made unavailable beginning on January 7, 2010 because the workstation is out of order.

The screenshot shows the 'Manage Site' interface for 'PVTC Select Test Lab (SiteID: 200050284)'. The 'Workstations' tab is active, displaying 'Available Workstations (3)'. A table lists workstations: ws 001 (Rules: Yes), ws 002 (Rules: No), and ws 003 (Rules: No). The 'ws 001 Unavailability Rules (1)' section shows a rule named 'Out of Order' starting on 'January 7, 2010' with no end date, running 'All Day'. A calendar view for January 2010 is visible, with the 7th highlighted. Buttons for 'Create New Workstation', 'Edit', and 'Delete' are present at the top and bottom of the rule section.

Name	Rules
ws 001	Yes
ws 002	No
ws 003	No

Rule Name	Start Date	End Date	Start Time	End Time	Day(s)
Out of Order	January 7, 2010	None	All Day	All Day	Su Mo Tu We Th Fr Sa

Workstation unavailability rules are removed weekly from Site Manager 93 days after the date of the rule is past. When it is removed, it is permanently deleted from the system and cannot be recovered. However, unavailability rules with no end dates are not removed and will remain in Site Manager.

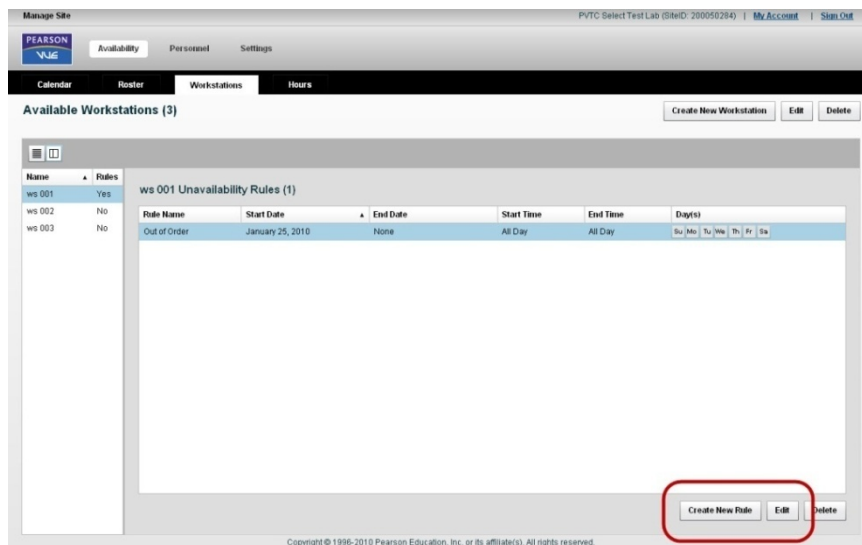
Follow the steps below to create or edit an unavailability rule for a workstation. You must have at least one workstation available before you can create a rule.

1. In Site Manager, click on the **Availability** category, and then click the **Workstations** tab.

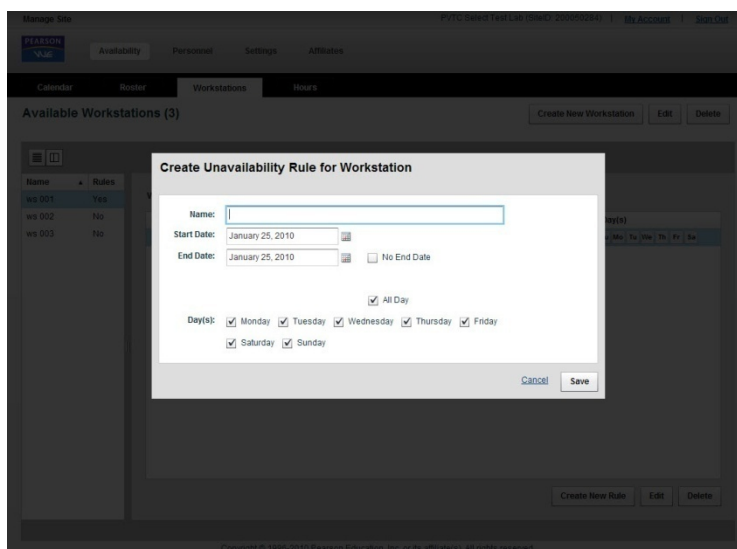
The **Workstations** tab displays a list of available workstations set up at your ITC.

2. **Select the workstation.**

3. To create a new rule, click the **Create New Rule** button located at the bottom of the screen. To edit an existing rule, first select the rule to edit, and then click the **Edit** button located next to the **Create New Rule** button.



The **Create Unavailability Rule for Workstation** or **Edit Unavailability Rule for Workstation** screen appears.



4. In the **Name** box, type the rule's name.

You must enter a name before you can save the rule. It is best to use a name that clearly indicates the purpose of the rule. For example: *Out of Order*

All rules must be named uniquely within each workstation.



**5. In the Start Date and End Date boxes, type or select a date for when the rule begins and ends.**

By default, the current date is automatically entered in the **Start Date** and **End Date** boxes. You must enter the date range for when the workstation will be unavailable. If you do not know when the workstation will be available again, select the **No End Date** check box.

You can also click the Calendar icons next to the **Start Date** and **End Date** boxes to select a date from a monthly calendar view.

**6. In the Start Time and End Time boxes, type or select a time for when the rule applies during the day.**

By default, the **All Day** check box is selected for the time. If the workstation is available for only part of the day, you must clear the **All Day** check box and enter or select from the drop-down list the times during the day for when the workstation will be unavailable.

You should specify a.m. or p.m. If you do not, then military time is assumed and the time automatically changes to a.m. or p.m. accordingly.

**7. In the Day(s) check boxes, select the days during the week for when the rule applies.**

By default, all the days of the week are selected. A check mark in a box indicates that the rule is in effect on that day. For example, if you want the asset to be unavailable every Monday during the specified date range, then clear all other days but Monday. If the asset is unavailable on all days of the week, then leave all the days selected.

The days of the week selected must fall within the specified date range. If you entered a start and end date that covers a date range of less than one week, you must select at least one day of the week that occurs in the date range you specified.

If you create a rule making the workstation unavailable all day for one day, such as on September 10, 2010, you may want to leave all the days selected so that the rule is applied no matter which day of the week September 10, 2010 happens to fall on.

**8. Click Save to confirm your changes or click Cancel to discard the changes you made.**

Various messages may display if you do not provide all the required information after clicking **Save**.

A message may appear asking you to confirm the rule creation if you set up the rule in the following situations:

- The rule makes a workstation unavailable for the next 45 days or longer.
- The rule makes an asset unavailable during a date range when the ITC is already closed.

- The rule coincides with another existing rule.

After you respond to any messages that appear, the rule is updated on the Detailed View pane.

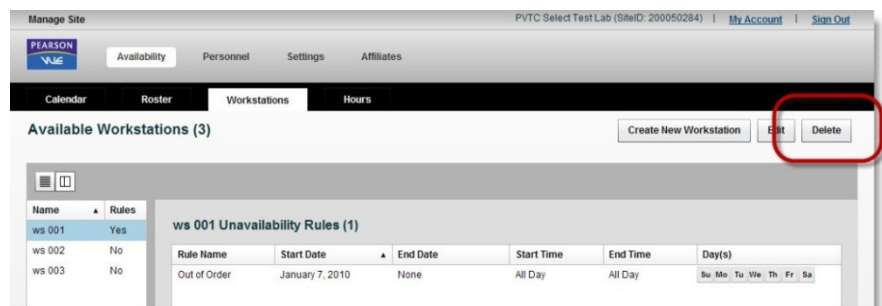
## Deleting a workstation

Follow the steps below to delete a workstation:

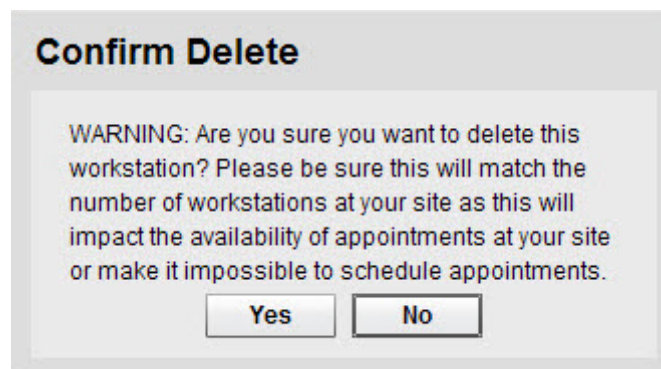
1. In Site Manager, click on the **Availability** category, and then click the **Workstations** tab.

The **Workstations** tab displays a list of available workstations set up at your ITC.

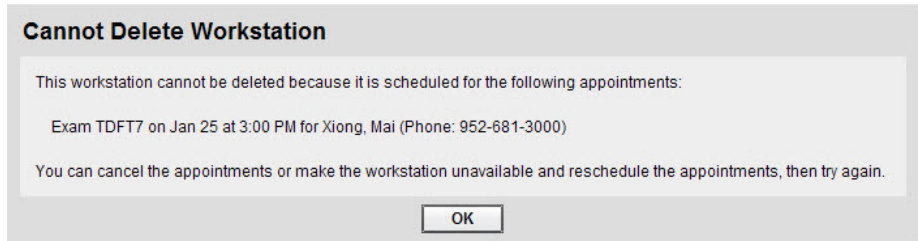
2. Select the workstation that needs to be removed from your ITC.
3. Click the **Delete** button above the Detailed View pane.



A confirmation message appears after you click **Delete**.



Site Manager will not allow you to delete a workstation that is required for an active test (one that has been registered for but not yet taken). You will see the following message if you try to delete an asset required for a scheduled test:



**4. Click Yes.**

The workstation or rule is removed from the system and no longer appears on the **Workstations** tab.

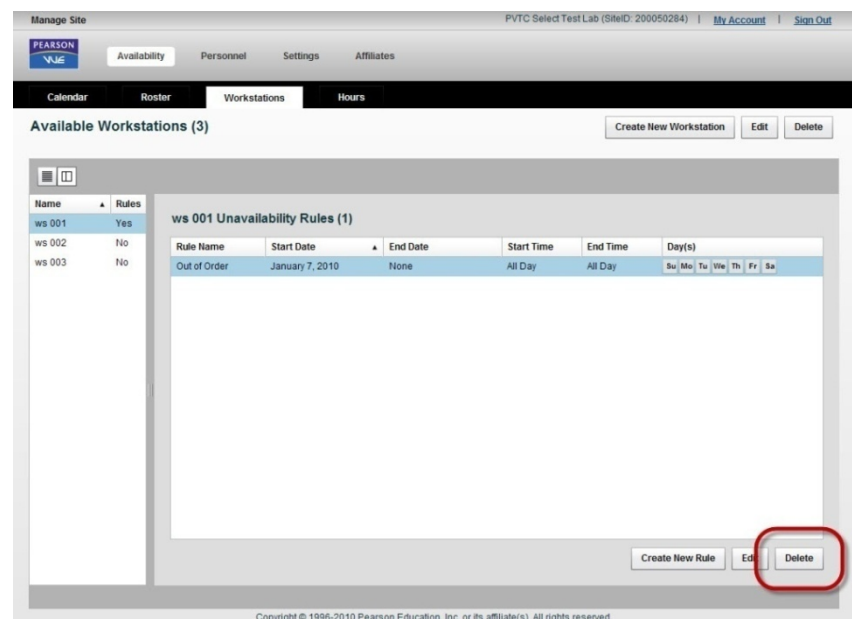
## Deleting an unavailability rule

**1. In Site Manager, click on the Availability category, and then click the Workstations tab.**

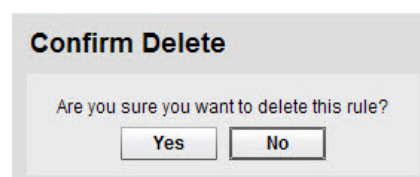
The **Workstations** tab displays a list of available workstations set up at your ITC.

**2. Select the specific workstation which has the rule to delete, and then select the rule from the Detailed View pane.**

**3. Click the Delete button located at the bottom of the pane.**



A message appears asking you to confirm the deletion.



**DO NOT** click the **Delete** button located at the top of the screen. Selecting this button will delete the workstation from the system.

#### 4. Click Yes.

The unavailability rule is removed from the system and no longer appears in the list.

## Workstation asset binding

The Pearson VUE Testing System software incorporates a feature called *workstation asset binding*. This feature enables the software to keep track of which workstation is used to deliver each test. Knowing which workstation was used can help VSS staff troubleshoot problems that are reported with a test. For example, if a test did not run properly because of insufficient memory on the workstation, a support person would be able to determine that very quickly since he or she would know exactly which computer was used for delivering the test.

The asset binding feature also enables you to get workstation information via the Exam Monitor application. This application allows test administrators to monitor the tests in progress and see where each candidate is in his or her test process. For example, with a glance at the screen, you would be able to see that the candidate at one workstation is working on the test tutorial while the candidate at the next workstation is working on the end-of-test survey. You would also be able to see the total amount of time each candidate is allowed for the test. Contact VSS to enable and setup workstation asset binding at your ITC.

The workstation asset binding and Exam Monitor features are *optional*, although Pearson VUE encourages ITC's to use them. The features are currently best for ITCs that have dedicated delivery workstations that do not change often.

## Site Termination

If for some reason your ITC must terminate the Pearson VUE Software Licence you must follow the steps listed below. Pearson VUE will terminate an ITC if prior notice has not been given regarding a change to the ITC test room location.

1. **Send Pearson VUE and CITB information about the intention to terminate the agreement, including the reason for and date of the termination. You can communicate this information by phoning or emailing VSS and ITC@citb.co.uk**
2. **Make sure that RMA runs before the termination date to ensure that all test results for your site have been transferred to Pearson VUE.**
3. **Check your ITC's schedule one year into the future. If there are any candidates scheduled for tests at your ITC within that time period, you are responsible for rescheduling them to a different location. Pearson VUE may assist you with this task.**
4. **After all results have been transferred and candidates have been rescheduled, delete the users from the personnel list in Site Manager.**

5. **Uninstall the Test Delivery Suite from each delivery workstation. From the Windows Control Panel of each delivery workstation, select Add/Remove Programs and remove the item named "Pearson VUE Test Delivery Suite."**
6. **Disable the delivery workstations by deleting all delivery workstation assets in Site Manager.**
7. **Send all Pearson VUE-related materials, including the ITC Policies & Procedures Guide, Exam Sponsor Guide and software CDs, to the Pearson VUE regional office nearest you. VSS can provide you with the address.**
8. **Pearson VUE will deactivate your ITC in the database so that CITB tests can no longer be scheduled at, registered through or delivered at your ITC.**

# Maintaining Security

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This chapter contains the following sections:

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<a href="#">Maintaining candidate confidentiality.....</a>	<a href="#">93</a>
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## Security overview

Security is the art and science of protecting the *confidentiality, integrity and availability* of an ITCs assets against unauthorised acquisition, damage, disclosure, manipulation, modification, loss, or misuse. These assets include everything from the facilities and personnel to computer systems and data.

Some important examples include:

- ❖ ITC facilities
- ❖ Equipment and software, including workstations and laptops
- ❖ ITC personnel and candidates
- ❖ The security of the testing process
- ❖ CITB intellectual property (including test questions and answers)
- ❖ Employee, candidate and customer information

Please become familiar with the privacy policy (available at <http://www.pearsonvue.com/legal/privacy>) and follow these guidelines at all times.

## ITC responsibilities

*Every ITC has a responsibility to help maintain security.*

ITCs are responsible for maintaining the security of test content and test-related materials at all times. A high level of security is essential for upholding the reputation of your ITC and for protecting test content, which is owned by CITB. Failure to protect the test content degrades the value of their certifications and puts your ITC and Pearson VUE at risk of losing the right to deliver these tests.

Upon becoming authorised, your test centre signed an ITC agreement that includes provisions relating to maintaining confidentiality and security in ITC operations. Each test administrator should maintain confidentiality and security, prevent cheating and item theft, and follow all applicable instructions from Pearson VUE concerning test security.

ITC personnel are required to comply with the security policies and procedures described in this guide. You should follow security procedures as directed by VUE Support Services (VSS) and Information Security.

If you become aware of any security violation at your ITC, please report it to Pearson VUE immediately.

## Information Security Team

The Information Security team is responsible for establishing, communicating and enforcing all security-related policies and procedures that apply in the ITCs. This team works closely with VSS, the Call Centre and CITB to investigate and resolve particular security issues.

Any time a security-related incident occurs in your ITC, it should be reported to Information Security as quickly as possible (in addition to following any standard incident reporting guidelines that may apply). Information Security will work with your ITC to resolve the situation, and will forward information to CITB if necessary. You may speak to several people when working with a security incident, but be sure to include Information Security early, even if the situation may seem to be resolved.

To report a security issue, contact Channel Quality and send an email to [PVTestSecurity@pearson.com](mailto:PVTestSecurity@pearson.com).

## Channel Quality

Responsible for quality assurance throughout the ITC network, including candidate surveys, ITC quality issues, training, and the test administrator certification program. Channel Quality coordinates the documentation of processes, policies, and procedures in the areas of Channel Quality, CITB information and customer service.

## ITC security

The following sections provide detailed information on how to handle certain security situations at the ITC.

### Lost or stolen property

You should notify both VSS and Channel Quality immediately if you discover any ITC equipment or candidate property have been lost or stolen, or if there is a possibility that something has been lost or stolen. This includes items such as:

- Computers (administration & delivery workstations)
- Test equipment
- File servers
- The Pearson VUE software applications/data files
- Passwords to the Pearson VUE applications
- Personal effects belonging to candidates

Information Security will determine what additional action needs to be taken and whether CITB need to be notified. Be sure to file an Incident Report.

Candidates' personal belongings should be left at home or locked inside the secure, individual lockers provided. Personal belongings could be used to assist answering test questions, or sending test information outside the test centre. It will also help to reduce potential fraud and theft.

### Disruptive, threatening or violent behaviour

Quite often a candidate's performance on a test is directly tied to career aspirations. He or she may be under pressure to pass or score well on a test in order to obtain or keep a job. Understandably, some candidates may experience anxiety before, during or after their test. In extremely rare cases, this may unfortunately result in confrontational or possibly violent behaviour if something unplanned occurs, such as:

- ❖ technical problems
- ❖ perceived distractions during the test
- ❖ disagreements over test delivery procedures
- ❖ poor performance on the test



Regardless of the situation, no candidate is ever justified in becoming confrontational or violent while in the ITC. If a candidate engages in violent or threatening behaviour, or you fear for your own safety or that of coworkers or candidates, contact on-site security or the police immediately.

## Handling emergencies

For emergencies that involve safety, **always** notify the police. Once things are under control, call VSS or Channel Quality to let them know the situation and whether any candidates are or were affected.

Make sure you are familiar with your organisation's and/or buildings emergency procedures. We recommend posting copies of important phone numbers (such as local police, fire and paramedic services, and Pearson VUE) in a visible place at all times.

Situations such as fire or weather-related emergencies should be prepared for as much as possible in advance to keep the panic level and/or property loss to a minimum. The physical safety of the candidate and ITC personnel should be the first priority in the event of any emergency or crisis.

## General guidelines for computer security

*You should follow your organisation's policies and procedures for computer security at all times. The information in this section is provided for information and guidance purposes only.*

When using your organisations computers, software applications and internet access, keep in mind the following guidelines designed to protect you, your ITC and its people:

- ❖ Never post, send or access material in violation of copyright laws or licencing agreements (this includes use of illegal file-sharing software)
- ❖ Never send messages or files that might contain viruses, worms or other malicious programs
- ❖ Don't visit web sites that are illegal, suspicious or otherwise prohibited by your organisation (as they may download unsafe programs to your computer)
- ❖ Never attempt to bypass or compromise security controls in the software
- ❖ Avoid passing on "chain emails" or spam

You should never open emails from unknown senders, or emails with suspicious attachments or subject lines (even if they appear to be from someone you know). Such emails may contain viruses, malicious software or inappropriate content and should be deleted without opening them.

Be wary of emails that appear to be asking you to provide personal information, even if they seem to be from an organisation you know and trust. Such emails may actually be 'bait' designed to lure you to a fake Web site where you will be asked to enter personal data such as your user name or password, credit card number, social security number, or mother's maiden name. This type of fraud is known as 'phishing', a rapidly growing form of identity theft. The best way to make sure you are dealing with a merchant you trust, and not someone attempting to commit fraud, is to initiate the contact yourself. Type the merchant's address into your Internet browser instead of clicking on a link in an email.

## **Access to Pearson VUE software and equipment**

Under no circumstances should you give unauthorised persons access to servers or test delivery workstations on which Pearson VUE Testing System software is installed. Be sure to report any suspicious activity of this nature immediately. This is to prevent someone from attempting to copy testing files from the systems.

Unauthorised personnel may not bring disks, cameras, devices for taking notes, other recording devices or writable electronic media into the test room. In most countries it is a *criminal offence* to attempt to gain unauthorised access to a computer system.

Technical support personnel and others who are not test administrators should not be assigned the permission to run the Delivery Manager application or the permission to create and edit other user accounts in Site Manager. Once an ITC is actively delivering tests, **ONLY** test administrators may have access to these functions.

## **Client Security Certificates**

Client security certificates enable you to securely access a variety of Pearson VUE systems, such as Site Manager. Each test administrator must install a client security certificate for each web browser in each workstation that the test administrator will be using to access Site Manager. You cannot access the Site Manager application on a workstation without an installed client security certificate issued specifically to you.

For example, if the test administrator is using one workstation and two web browsers to access Site Manager, such as Internet Explorer and Mozilla Firefox, then two client security certificates need to be issued for the test administrator on that workstation. However, if the test administrator is using two workstations and two web browsers in each workstation, then four client security certificates need to be issued for the test administrator. Two of the four certificates would be used for one workstation and the other two would be used on the second workstation.

A client security certificate expires after one year. You will receive an email reminding you to request a new certificate 30 days before the certificate expires.

## **Software Licences**

ITCs are required to have appropriate software licences for all operating systems and application software installed on the computer equipment used for test administration and delivery.

## **User Accounts**

After the initial chief administrator has been certified by Pearson VUE, the chief administrator must create his or her own account using the Site Manager application. The initial chief administrator needs to be assigned all user permissions.

Each test administrator must have his or her own user account with a name and password, and the account should be assigned the appropriate permissions. Also, each user account must be associated with a specific person. Generic account names, such as “administrator” are not permissible because Pearson VUE must be able to contact the specific test administrator involved if there are problems with a registration or test delivery.

## **Password protection (strong passwords)**

User names and passwords must always be kept confidential. Never disclose this information to others.

If another ITC employee or somebody calling and claiming to be from Pearson VUE asks you to give them your password information, politely refuse. In such cases, report the incident to VSS.

Username and passwords must meet the Pearson VUE guidelines and be kept confidential in order to keep the software secure. If you suspect that the security of the Pearson VUE applications or test delivery have been jeopardised, call VSS immediately.

When creating or changing passwords, you must create strong passwords using the following principles:

- ❖ **Use passwords that are easy to remember but hard to guess**
- ❖ **The password must be a minimum of 7 alphanumeric characters.**
- ❖ **The password must contain at least 3 of the following 4 characteristics** -- an upper case letter, a lower case letter, a number, a special symbol. The special symbol could be any of the following: ! ' # % & [ ] \* + , - . / : ; < = > ? @ ( \ ) ^ \_ { | } ~ `
- ❖ **The user's name cannot be present within the password**
- ❖ **Do not write passwords down**
- ❖ **Change passwords regularly** -- The systems force you to change your password once every thirty days. In addition, you may not reuse the same password within one year.
- ❖ **Do not use the same password for every system you access**

If you forget your password or your account is locked, you should contact the chief administrator who has the permission to reset passwords/unlock accounts. If they are unavailable (or you are the chief administrator), then contact Channel Quality or VSS. The person resetting your password or unlocking your account will ask you for your security questions. Once you confirm the answers, they will be able to reset your password or unlock your account.

Passwords will not protect a system that is logged in and left unattended. Never leave software applications open and running unattended on the administrator or test delivery workstations. If you need to leave your desk, be sure to close all the software applications. At the end of the day, always shut applications down properly and log out off the network completely.

## Security questions

You will be required to maintain two security questions in conjunction with your passwords. If your account becomes blocked contact the chief administrator at the ITC or Pearson VUE directly. The security questions are considered a set. If you update or change one security question, you will be required to update or change the other. However, there is no restriction on reusing questions and answers. The security questions/answers do not expire. Use discretion when submitting your answers as you will need to provide the answers to the questions if you forget your password.

## Candidate's personal information

Pearson VUE collects personal information from candidates in order to be able to provide testing services to those candidates on behalf of CITB. This information can include candidate names, social security numbers, and demographic information, admissions data, identification documents and so forth. Although candidates must agree to provide certain private information if they wish to take a test, the information still belongs to the candidates and all care is taken to protect it from loss or unauthorised access or alteration.

Special security measures are implemented to ensure that only properly authorised and identified candidates are allowed to test, and to prevent and detect test fraud. They are an integral part of the testing process, so once a candidate registers to take a test they cannot 'opt-out' of providing this information. However, some candidates may still express discomfort or surprise when asked to provide certain information, such as a photo and signature.

If a candidate asks why an admissions data is asked of them, inform the candidate that these are required in order to ensure that the person in front of you is really the candidate shown on the schedule, and to help Pearson VUE and CITB prevent test fraud. Reassure the candidate that personal data, including the admissions data, are properly secured and handled confidentially at all times by Pearson VUE and CITB.

This is explained in the Candidate Rules Agreement reviewed by each candidate during the admission process. Additional information (including contact information if they have further questions) can be provided to candidates by referring them to the **Privacy Policy** on the Pearson VUE Web site at: <http://www.pearsonvue.com/legal/privacy/>

## Maintaining candidate confidentiality

As a test administrator, you play an important role in maintaining the confidentiality of candidates' personal information and other confidential data. You can do this by keeping in mind the following guidelines:

- ❖ Never leave software applications open and running unattended on the administrator or test delivery workstations. When you take a break, go to lunch, end your work day or ***leave the ITC for any period of time***, be sure to log out of ***all*** applications you have logged in to. The test administrator who is currently registering, invigilating, and/or administering tests must log into the applications with their personal username and password.
- ❖ Never share user names and passwords with your colleagues. They may not be authorised to access the same data as you. Even if they are, you will be held responsible for any data breach that takes place using your account.
- ❖ Do not read candidates' personal information aloud in the presence of other candidates or ITC personnel.

- ❖ Do not include confidential information such as credit card numbers, social security numbers or ID numbers in the text of Incident Reports.
- ❖ Do not include test content or any description of test content in the incident report. Test content is defined as questions, response selections and any text on test supplements, whole or partial.

If the candidate has a complaint about a specific test question, please ask for the question (item) number. File an incident report that includes only the item number.

- ❖ Never provide candidate information from the Pearson VUE applications to unknown persons over the phone or by email, even if they claim to be from Pearson VUE. If anyone has a legitimate need for such information they will get it from the Pearson VUE systems and will not need to ask you for it.
- ❖ Similarly, be alert to potential ‘social engineering’ attempts, whereby unauthorised persons may pretend to be someone they are not in order to get confidential information from you. Never trust an unknown person asking for your password or other confidential information.
- ❖ Report any suspicious behaviour or suspected confidentiality breaches to VSS and Information Security immediately.

## Securing documents with candidate information

All documents or electronic files that contain candidate information must be handled securely. The following requirements are particularly important:

- ❖ Take care to ensure that each candidate is given the correct score report. Ask the candidate to verify their name and show you their ID prior to giving them the score report.
- ❖ Do not leave important documents or printouts lying around where somebody else might pick them up.

**Never** throw documents containing confidential data in the bin—always shred such documents first.

## Test security and fraud

When test content is protected and the security of the testing process maintained, everyone who relies on the test results (including candidates, CITB, certifying boards, employers and schools) can be assured of their validity and integrity. On the other hand, if test security fails, those same stakeholders lose confidence in the value of the test, and everyone suffers, including the candidates who worked honestly to achieve their test results.

Therefore it is easy to see why maintaining the security of the test is absolutely essential in the testing business.

## Types of test fraud

There are several common types of test fraud strategies that candidates might attempt to use. As a test administrator you should become familiar with all of these:

- ❖ Using unauthorised materials
- ❖ Collusion
- ❖ Proxy testing
- ❖ Retake violation
- ❖ Theft of test content
- ❖ Bribery

### Using unauthorised materials

Candidates may attempt to take notes or other unauthorised materials into the test room for use while taking the test. This behaviour could be as blatant as trying to smuggle in a text book or study guide. But more often the attempt is much more covert and difficult to spot. For instance, a candidate may conceal a cheat sheet inside clothing, shoes or reading glasses. Or notes may be written directly onto a covered part of the body (such as an arm, leg or the chest), inside an item of clothing or concealed within some other item allowed in the test room. Notes may be written in plain language or they could be disguised as body markings (such as a tattoo), clothing patterns (on a shirt collar or tie for example) or even seemingly random markings.

A different strategy is for two candidates who are friends to work together. One will distract the test administrator with a question while the other uses the opportunity to access notes without being detected.

### Collusion

Collusion is the practice of obtaining assistance from one or more other people while taking the test. This may be as simple as one candidate allowing another to look over his or her shoulder during the test. More deliberate collusion can occur when candidates provide assistance to one another via quiet conversation, by passing information to each other on a piece of paper or other material, or by using some other means of non-verbal code (such as coughing, yawning, stretching or patterns of finger tapping).

Collusion can also involve attempts to communicate with and receive assistance from people outside the test room. For instance, a candidate might try to smuggle in a mobile phone in order to receive assistance via text messaging. In some rare cases, candidates have even been caught wearing a concealed microphone, ear piece and two-way transmitter which were used to communicate with an accomplice in a van parked just outside the ITC.

### **Proxy testing**

Some candidates may enlist another individual to take the test on their behalf. This is known as proxy testing because it involves using a proxy, or substitute test taker in place of the real candidate. The proxy tester might simply be a friend or family member of the candidate trying to 'help out', or they may actually be part of an organised scheme that earns the proxies hundreds or even thousands of pounds for their efforts. A proxy tester may even look similar to the real candidate or try to fool ITC personnel by using fake identification.

Alternatively, a candidate may come to the ITC to complete the admission procedures but then try to switch places with an accomplice before going into the test room.

Convictions in proxy testing cases have in some cases led to business closures and criminal sentences.

The primary deterrents to proxy testing are the special security measures in place at ITC's, including admissions data capture and the strict identification and admission procedures.

### **Retake violation**

Retake violations occur when a candidate is able to take a test less than 48 hours after the failed test was taken. Since waiting periods are automatically enforced by the Pearson VUE Testing System, the main way a candidate would attempt to circumvent the policy is by registering for the same test under two or more different identities. As with proxy testing, this may involve the use of fake or altered identification.

### **Theft of test content**

The preceding strategies have all been related to candidates trying to obtain results unfairly. Another type of test fraud to actively look out for is item theft. This refers to the practice of copying or otherwise recording test questions for later distribution outside of the test room.

While some candidates do not consider copying or 'sharing' items to be a serious matter, it is actually a very serious form of intellectual property theft, and often illegal. The test questions and answers are copyrighted trade secrets belonging to CITB. Unauthorised copying, sharing or distribution of test items occurs primarily for the purpose of helping people obtain an unfair result on the test. This reduces the reliability and validity of the test as an instrument for measuring and assuring competency. Consequently, the more this occurs the more the credibility of test is compromised.



Some may steal items in order to improve their own score on a subsequent attempt, or to help out a friend who is taking the test at a later date. Other individuals or organisations may encourage candidates to memorise a certain number of questions and divulge them after leaving the ITC. In some cases individuals working for ‘test preparation’ companies have scheduled to take tests explicitly for the purpose of helping the company to gain exposure to as many items as possible.

Two chief methods are used to remove test items from the test room. The first involves copying and removing them in written form, for example on a piece of paper, inside clothing or on some covered part of the body. The second method involves the use of concealed recording devices or transmitters. Recorders, transmitters, microphones, cameras and scanners are becoming smaller, more sophisticated and less expensive, and therefore easier for candidates to try to smuggle into the test room.

### **Bribery**

Finally, another strategy that may be used in conjunction with any of the above is attempting to bribe or otherwise persuade a test administrator to provide assistance or to permit some kind of unfair advantage. For example, a candidate may offer the test administrator money in exchange for skipping the proper identification procedures or allowing them to take a friend or study notes into the test room.

The integrity of the test delivery process depends on each test administrator’s commitment, integrity and vigilance. If you become aware of any candidate attempting to entice you or another test administrator into unethical behavior, contact VSS or Information Security immediately.

## **Guidelines for minimising test fraud and maintaining a secure test environment**

Now you are familiar with the different types of test fraud, it is easy to understand why paying close attention to candidate behaviour is the single most important factor in minimising its occurrence in the ITC. The following are some guidelines that will help you to maintain a secure testing environment.

- ❖ Follow documented procedures and instructions at all times. Many of these procedures have been refined from years of experience in test delivery and, when followed, prevent the vast majority of attempted test fraud. When ‘shortcuts’ are taken, these often increase exposure to potential security threats.
- ❖ Any employee or test administrator of an ITC must not take a CITB test at their own ITC.
- ❖ Do not discuss test content with candidates or with other ITC personnel at any point. Remind candidates that they are prohibited from talking about a test’s content with other candidates. Report any candidates you suspect might be violating the confidentiality of the testing process by discussing items outside the test room.

*ITC admission:*

- ❖ Be familiar with the minimum 48 hour retake policy. Some cases of attempted retake violations have been thwarted by vigilant test administrators who remembered admitting the same person previously under a different name.
- ❖ Pay particular attention to identification requirements and the rules agreement the candidate must read and agree to. Every candidate must present the proper forms of ID and agree to the rules agreement before being permitted to take a test. Thoroughly check identification to ensure that all details match the candidate.
- ❖ Never perform the identification check in a perfunctory manner, but rather take care to examine the photograph and other details to ensure you are confident that the candidate really is the person pictured on the identification.
- ❖ Be on the alert for identification that looks fake, altered or in any way suspicious.
- ❖ Ensure that admissions data are always captured properly and according to CITB policies.

*Test room check-in:*

- ❖ Every candidate must sign an ITC test log before being admitted to the test room to begin the test and to consent to having their image taken. The test administrator invigilating the test must also sign and print their name on the test log.
- ❖ Be on the lookout for unusual or suspicious items attached to or concealed inside clothing.
- ❖ Candidates are not permitted to bring personal belongings into the test room.
- ❖ Watches, phones and other prohibited items that the candidate brings to the ITC should be placed in an individual secure locker provided.
- ❖ Don't allow candidates to speak with other candidates or look at their screen while they are being escorted into the test room.
- ❖ Where possible, avoid seating candidates who appear to be friends or coworkers next to one another.
- ❖ Never allow a candidate into the test room with study guides, reference materials or dictionaries.
- ❖ If a candidate refuses to store items or hand them over, inform the candidate that CITB will be informed of the incident, and then turn them away.
- ❖ Study materials (including study guides, notes, PDAs and so forth), blank notepaper or writing materials are not allowed inside the test room. If you are ever unsure whether the ITC and CITB policies permit a candidate to be admitted with a particular item, please contact Pearson VUE for assistance.

### *Invigilating:*

- ❖ **No test may be taken without an invigilator and the invigilator must be a Pearson VUE certified test administrator.** Never leave the test administrator's workstation unattended when testing is in progress. Candidates must be monitored continuously throughout their tests. The test administrator must always have a clear view of all workstations and the hands of all candidates should be visible.
- ❖ Checking in on candidates periodically during a test is NOT an acceptable form of monitoring. When invigilating tests, be sure to remain focused on monitoring the actions of testing candidates at all times, by ensuring you maintain direct line of sight of all candidates inside the test room.
- ❖ Listen for signs of possible communication in the test room.
- ❖ Watch all candidates closely and be alert to potentially suspicious behaviour and possible signs of test fraud. Such behaviour may be difficult to detect, but might include activity such as repetitive adjustments to clothing, excessive leaning or stretching, apparent efforts to hide something from view of the test administrator or CCTV (if applicable).
- ❖ Always ask a second test administrator to assist with monitoring if you are busy assisting a particular candidate.

## Candidate misconduct/cheating

Candidates taking tests have certain responsibilities. Their conduct must not affect other candidates within the test room. Candidates are forbidden from writing or otherwise recording questions and removing them from the ITC. Items used to assist a candidate in taking the test, or in removing questions from the test room, are referred to as "forbidden items," and using them is considered to be cheating.

## Types of misconduct

Candidates who create disturbances or conduct themselves in a manner that may jeopardise the security of a test or the comfort of other candidates must ***immediately*** be reported through an Incident Report. The report must contain the candidate's name, workstation number (if applicable), a detailed description of the act of misconduct (including the actions the test administrator took) and the resolution. If you are not sure how to handle an act of misconduct, call VSS for assistance.

Misconduct includes, but is not limited to, the following behaviours:

- ❖ Using unauthorised materials or prohibited testing aids in the test room.
- ❖ Taking a test for someone else.
- ❖ Giving or receiving unauthorised assistance of any kind.

- ❖ Failing to follow ITC rules or test administrator instructions.
- ❖ Causing disruptions or disturbances of any kind.
- ❖ Attempting to remove test questions or responses or notes about the test from the test room.
- ❖ Talking to other candidates during the test.
- ❖ Tampering with computer hardware or software, or attempting to use it for any purpose other than taking the test.
- ❖ Cheating
- ❖ Studying on an unscheduled break

## Responding to candidate misconduct

The test administrator's primary responsibility is to maintain a positive and distraction free test environment at all times. From time to time this will involve responding to unacceptable candidate conduct. Test administrators are expected to remain vigilant and to respond promptly and professionally to any observed or suspected irregularities.

To maintain the proper testing atmosphere as well as your own safety, try to deal with the situation effectively while avoiding unnecessary confrontation with candidates. It is always important to try to remain as calm as possible so proper procedures can be followed. Follow the three step Witness-Intervene-Notify (**WIN**) process, described in detail below.

- 1. Have a coworker WITNESS the candidate's behaviour.**
- 2. INTERVENE to deal with the situation. If the candidate is taking the test, stop it, remove the candidate from the test room (if necessary) and inform him or her of next steps that will be taken.**
- 3. NOTIFY the appropriate personnel and file an Incident Report.**

It is not your responsibility to make decisions or judgments about the legitimacy or severity of any individual's conduct. Pearson VUE and CITB will make the final determination in this respect.

### Witness

In all suspected incidents of misconduct, it is important wherever possible to have another test administrator or coworker observe the questionable behaviour and remain on hand through the remainder of the process. Doing so helps to ensure that proper process is followed and to establish a credible record of what took place.

In such situations, responding to a candidate misconduct situation always takes precedence over other tasks such as admitting candidates.

### Intervene

Before intervening, arrange for the second administrator or coworker to be present. Even if he or she did not directly witness the candidate's behaviour, a second person is important as a witness to the conversation with the candidate.

If the candidate is currently testing and there are other candidates present, safely escort the candidate from the test room before proceeding any further. Any conversation with the candidate must take place away from the test room, in order to minimise distraction or distress to other candidates.

If the candidate's test is in progress, enter the test room and **stop** the test. Inform the candidate that a break is required and ask him or her to step out into the waiting area. Do not put the test into unscheduled break mode or leave it with a question on the screen. In the event that the candidate is later permitted to resume testing, he or she will not lose any time as a result.

Once away from the test area, do not directly accuse the candidate of misconduct or make judgmental statements about his or her behaviour. Instead, describe what you observed and explain which testing policy was violated. It is important that the candidate is properly informed of the observed behaviour and given an opportunity to cooperate from this point forward.

When speaking to a candidate during stressful situations, here are a few pointers on what to say/or not say when you are talking to a candidate whom has broken a rule:

- **Don't** use the word(s) "cheating" or "misconduct," but instead say "policy violation."
- Candidates may become defensive and complain if a test administrator accuses them of cheating
- **Never** mention to candidates what will or will likely happen to the scores in situations of policy violation. Don't use phrases such as "Everything will be okay" or "Your scores won't be invalidated." Inform the candidate that an Incident Report will be filed and Test Security, along with CITB will handle the incident and will come to a decision on how to proceed.
- **Remember**, test administrators should always call the Program Coordinator at Pearson VUE to inform them of the candidate's policy violation and to obtain direction on whether the candidate should be allowed to continue testing or not.
- **Always** be kind, pleasant and understanding.
- **Never** gossip or talk about past candidate's violation of policy.

If the test has already ended and generated a printed score report, do not hand it to the candidate.

If any unauthorised materials or prohibited items were involved, attempt to secure these for evidence. For example, if the candidate was observed using concealed study notes, describe the policy on prohibited items and politely (but firmly) ask the candidate to surrender them. However, while it is important to try to confiscate prohibited material this should never be done through force or in a manner that might place you, or anyone else, at risk.

Inform the candidate that you will contact Pearson VUE and file an Incident Report, CITB will be notified and you will be retaining any surrendered materials. Ask the candidate to sit in the waiting room and do not allow him or her to return to the test room at this point.

The test administrator's safety and the need to maintain a distraction-free test environment should be taken into account throughout this step in the process. If the candidate engages in violent or threatening behaviour, or you fear for your own safety or that of coworkers or candidates, contact on-site security or the police immediately.

### Notify

Once the situation in the ITC is under control, contact Pearson VUE immediately and ask to speak to a Program Coordinator. The Program Coordinator will provide instructions concerning what to do next. If for any reason you are unable to reach a Program Coordinator, ask to speak to either Information Security or VSS.

If Pearson VUE grants permission for the candidate to resume his or her test, you may return with the candidate to the test room and restart the test. Otherwise, you must now politely ask the candidate to leave the ITC.

Unless instructed to do so by the Program Coordinator, do not return any confiscated materials to the candidate. Also, do not speculate or enter into any discussion as to what the repercussions might be for the candidate. If the candidate has any questions he or she should be advised to contact the call centre and speak to the Program Coordinator. **Do not** advise the candidate to contact CITB directly.

Immediately after notifying Pearson VUE, file a detailed Incident Report.

## Candidates who are suspected of proxy testing

Listed below are steps the test administrator should follow when you suspect a candidate of proxy testing.

- ❖ Complete all admission steps to collect the candidate's admissions data. Do NOT revoke the candidate's admission.
- ❖ After the admissions data is collected, click the **Admit** button in Admissions Manager. This button should be clicked BEFORE you say anything to the candidate about their identification.

- ❖ If you are able, scan the candidate's photo identification or make a photocopy. After the identification has been scanned and the candidate has been admitted in the Admissions Manager application, you should then advise the candidate that there is a problem with their identification and he/she will be unable to test. If the candidate has any questions, advise them that they will need to contact the Pearson VUE call centre for further information.
- ❖ Do NOT allow the candidate to test.
- ❖ You should call the Program Coordinator and report the incident.
- ❖ Create an incident report and choose the topic "Candidate Error or Misconduct." Attach the scanned copy of the candidate's photo ID.
- ❖ You should then call VSS to have the admissions data retrieved and saved for the candidate. The admissions data should be attached to the incident.

## **Filing Incident Reports for misconduct**

It is essential to file an Incident Report as soon as possible following any situation involving candidate misconduct. Doing so will ensure that the escalation process to CITB is begun promptly.

Submit an Incident Report using the topic "Candidate error or misconduct." If the ITC is busy, you may enter a brief description along with a note that you will update it with complete details before the end of the testing day.

Always include the following information in the completed Incident Report:

- ❖ Test administrator name, phone number, and email address
- ❖ Complete a detailed description of the candidate's behaviour, including the sequence of events that were observed
- ❖ Location or situation of the candidate when he or she was confronted
- ❖ Names and roles of all other people who witnessed the candidate's behaviour or who were present when the candidate was confronted
- ❖ Description of the candidate's reaction, and any discussion between the candidate and the test administrator
- ❖ Description of any prohibited materials the candidate used, if applicable, and whether or not these were confiscated or surrendered
- ❖ Comments made by both the test administrator and the candidate
- ❖ Any other relevant information concerning the incident

Information Security will review the Incident Report and may ask follow up questions.

In certain cases Information Security may require a formal, signed statement from you during the follow-up investigation or candidate appeals process. In such cases, Information Security will notify you and prepare a written statement from the information included in the Incident Report. You will have the opportunity to review the statement and make any necessary corrections. After this the statement must be printed, signed by each test administrator present during the incident and subsequent intervention, and then sent to Information Security.

## **Confiscated material**

All material that you confiscate from candidates should immediately be mailed to your regional Channel Quality at Pearson VUE, The Lighthouse, 14 The Quays, Salford M50 3BF.

If a candidate refuses to hand over materials, document that fact in the Incident Report. At no time should you force a candidate to hand over materials, and you should avoid conflict with the candidate.



# Daily Start up / Daily Shutdown

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The ITC must be prepared before the first candidates arrive to take their tests each day. The ITC must also file and store materials properly and close applications at the end of each day.

Your ITC's manager will determine your work schedule and hours. However, it is recommended that test administrators arrive at work at least 30 minutes before the first test is to be delivered for the day. This allows test administrators time to perform the tasks described in this chapter and to be available for candidates who arrive early for check-in.

This chapter contains the following sections:

<a href="#">Daily Start up Checklist.....</a>	<a href="#">105</a>
<a href="#">Checking RMA.....</a>	<a href="#">105</a>
<a href="#">Checking the schedule on the VSS website.....</a>	<a href="#">107</a>
<a href="#">Checking the schedule in Admissions Manager.....</a>	<a href="#">111</a>
<a href="#">Checking the schedule in Site Manager.....</a>	<a href="#">114</a>
<a href="#">Testing Admissions Data Equipment.....</a>	<a href="#">120</a>
<a href="#">Daily shutdown tasks.....</a>	<a href="#">120</a>
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## Daily Startup Checklist

The *Daily Startup Checklist* lists all startup procedures. The VSS Web site contains a copy of the list that you can duplicate and keep at the front desk for easy reference.

## Checking RMA

The Pearson VUE Application Wrapper automatically connects to the Pearson VUE hub over the internet at scheduled intervals, including during the night, to run the Remote Maintenance Agent (RMA). (The Wrapper is a scheduler that runs on your server and automates RMA.) Normally, the Wrapper runs RMA at midnight and at intervals throughout the day to upload completed test results. During these connections, files and information are exchanged between Pearson VUE and your ITC.

It is important to verify each morning that RMA ran properly during the night, to ensure that your ITC has the latest schedule and test information. If the Application Wrapper did not run RMA automatically, ensure that the server was powered ON overnight. If the server was powered on, then you must contact VSS immediately for assistance.

The VSS web site provides an RMA Connection log report that allows you to look at your ITCs RMA connection history for a specified period. Follow these steps to run the report and check your ITCs RMA status:

1. Using your web browser, navigate to the VSS web site using the following URL:

<http://vss.pearsonvue.com>

2. On the Welcome page, type the username and password you use for the Pearson VUE applications and enter your site ID. Click the Login button.

The main page of the web site indicates whether or not your Wrapper service is working properly, as shown below.

The screenshot shows the Pearson VUE Support Services website. The page includes a navigation bar with links like TEST CENTER GUIDE, INCIDENTS, FAQs, DOWNLOADS, HOW AM I DOING?, REPORTS, WHAT'S NEW?, MARKETING TOOLS, VOUCHERS, and PEARSON VUE. The main content area shows a welcome message, user information (App User ID: 200576320, VUE ID: 202122423), and system stats. A callout box points to the 'RMA Connection Log' link in the System Stats section, indicating that clicking this link will run a report providing information about when the Wrapper service ran RMA.

3. Click the RMA Connection Log Report link. On the Connection Log Site Selector page, choose the time period you want the report to cover, and then click Run Report.

The screenshot shows the Connection Log Site Selector page. The page includes a navigation bar with links like TEST CENTER GUIDE, INCIDENTS, FAQs, DOWNLOADS, HOW AM I DOING?, REPORTS, WHAT'S NEW?, MARKETING TOOLS, VOUCHERS, and PEARSON VUE. The main content area shows a form to select a site's RMA connection data for today or any of the pre-defined time periods. The date is 25-Nov-2008. The form includes radio buttons for 'Today's Connections', 'Last 7 Days', 'Last 14 Days', and 'Last 30 Days'. A 'Run Report' button is at the bottom.

The report appears on the screen and shows connection history information, which indicates the times at which RMA connected to the hub. The report should list when RMA connected since midnight on the previous day. If no connections have taken place, ensure that the server is powered ON. If the server is powered on, then you must contact VSS immediately for assistance.

PEARSON VUE Support Services			TEST CENTER GUIDE	INCIDENTS	FAQs	DOWNLOADS
			HOW AM I DOING?	REPORTS	WHAT'S NEW?	PEARSON VUE
			MARKETING TOOLS	VOUCHERS		
07:33 PM	07:33 PM	5 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11:55 PM	11:55 PM	5 seconds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>24 Nov 2008</b>						
07:50 AM	07:50 AM	6 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11:50 AM	11:50 AM	4 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
03:50 PM	03:50 PM	5 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

How to interpret this report	
Column	Explanation
Start Time	The time that RMA logged into Hub database. This is a server timestamp, so it is in US Central time (GMT -06:00)
End Time	If RMA is successful, this is the time it completed.
Elapsed Time	Shows the duration of the process.
Run Manually	If checked, indicates that RMA was launched manually. If unchecked, the VUE Wrapper Service initiated the RMA session.
Maintenance Cycle	The type of RMA run. The Maintenance cycle is run once a day, usually at 12:00 am local time. If unchecked, an SDR Upload cycle was run.
Complete	Indicates if the RMA was able to run to completion or not.

[Return to Top](#)

— This area shows information about when your Wrapper service ran RMA.

## Checking the schedule on the VSS web site

It is important to check your ITC's test schedule frequently using Site Manager, Admissions Manager, or the VSS web site. You cannot change the information as it appears on the schedule, but you can use it to check in advance how many tests you will be delivering throughout the day, which tests candidates will be taking, whether or not candidates require special assistance/accommodations, and other schedule details. It is also important to check the schedule for future days/weeks to be aware of when candidates are scheduled to test at your ITC.

The **Exam Schedules** report on the VSS web site provides details about your ITC's schedule. The report lists tests scheduled at your ITC for the current day or a selected time period. You can display the schedule in either list or chart form. Follow these steps to view the report.

1. Using your web browser, go to the VSS web site at <http://vss.pearsonvue.com>. On the Welcome page, type the username and password you use for the Pearson VUE applications and enter your site ID. Click the Login button.
2. Click the Reports button in the upper right corner of the page.

The following page is displayed:

The screenshot shows the Pearson VUE Support Services website. The header includes the Pearson VUE logo and 'Support Services' text. Navigation links at the top right include TEST CENTER GUIDE, INCIDENTS, FAQs, DOWNLOADS, HOW AM I DOING?, REPORTS, WHAT'S NEW?, MARKETING TOOLS, VOUCHERS, and PEARSON VUE. The main content area is titled 'Reports' and includes links for Exam Schedules, Exam Sponsor Info, Exam History, and Exam Registrations. It provides instructions on how to use the reports and includes a 'Logout' link. At the bottom, there are links for Exam Historical Summary and Site Availability Calendar, and a footer with contact information and a list of site links.

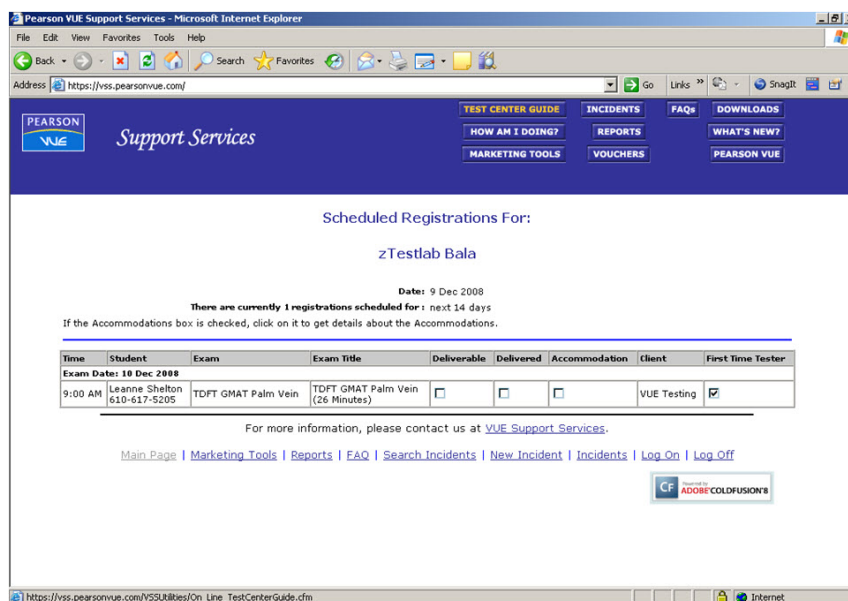
**3. Click the Exam Schedules link.**

After you click the **Exam Schedules** link, the following page is displayed:

The screenshot shows the Pearson VUE Support Services website in a Microsoft Internet Explorer browser window. The page is titled 'Exam Schedules' and prompts the user to 'Please Select Report Parameters'. It features a 'Report Sections' section with a 'Display Report Sections' checkbox and a 'Chart Format' checkbox. Below this is a 'Select Date Parameters' section with a 'Select a Date Range' dropdown menu. The dropdown menu is open, showing options: Today's Schedule, Next 7 Days, Last 7 Days, Next 14 Days, Last 14 Days, Next 30 Days, and Last 30 Days. There is also an 'OR' section with 'Select Start Date' and 'Select End Date' fields, both set to 12/01/2008 and 12/31/2008 respectively. At the bottom, there are 'Run Report' and 'Reset' buttons.

**4. On the Exam Registration Report Selector page, make selections for the report and then click the Run Report button.**

Examples of the Exam Schedules report are shown on the following pages.



When you click Today's Schedule or one of the other time period options, the Exam Schedules report is displayed as shown on the next page.

- ☐ **Time** -- This column lists the starting time of the test appointment.
- ☐ **Student** -- This column displays the name of the testing candidate.
- ☐ **Exam/Exam Title** -- These columns indicate the test identification code/number and title, the length of the test (in minutes).
- ☐ **Deliverable/Delivered** -- If the Deliverable box is checked, the test is available for delivery; if the Delivered box is checked, the test time has passed and the results have been uploaded to Pearson VUE. An empty Deliverable box means the test has not yet been downloaded to your ITC. When checking your schedule each morning, make sure all tests for the day are marked deliverable. If they are not, click the candidate's name to see a status message at the bottom of the window explaining why the test is not available. If RMA did not run a Maintenance Cycle during the previous night and the server was left on, contact VSS immediately for assistance. However, to prepare tests that are not ready, you may run RMA manually.

RMA transfers tests from Pearson VUE to your ITC. Tests are transferred as close to the delivery date as possible, to ensure that your ITC has the most current version of the test available. This means that the Deliverable box may not be checked for tests that will be delivered sometime in the future—RMA will transfer the test a day or so before it needs to be delivered.

- ❑ **Accommodation / Special Assistance** -- A checkmark appears in the box in the Accommodation column if the registration has been granted accommodations. Click the checked box to display details about the accommodation, for example a foreign language voiceover.

When you run an Exam Schedules report, you can also generate a handy, colour-coded chart listing each workstation at your ITC and how it is scheduled throughout a specific day. To generate this chart, click the **Exam Schedules** link to display the Exam Registration Report Selector page. First select the **Today's Schedule** and **Chart Format** options as shown below, and click the **Run Report** button.

Select the Today's Schedule and Chart Format options to generate an initial chart for the current day.

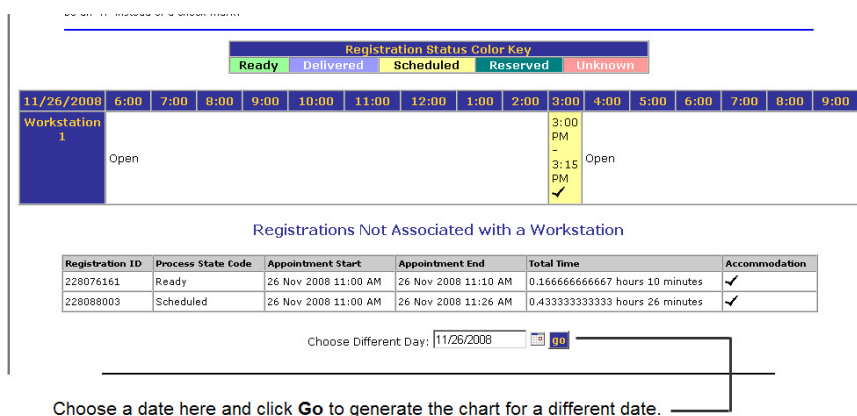
Your report displays in the chart format shown below.

Registration Status Color Key				
Ready	Delivered	Scheduled	Reserved	Unknown

	9:00	11:00	1:00	
ws 001	9:00 AM - 3:00 PM ✓			Open
ws 002	9:00 AM - 3:00 PM ✓			Open
ws 003	9:00 AM - 3:00 PM ✓			Open
ws 004	9:00 AM - 3:00 PM ✓			Open
ws 005	9:00 AM - 12:30 PM ✓	12:30 PM - 4:00 PM ✓		
ws 006	9:00 AM - 11:30 AM ✓	Open		
ws 007	Open	9:30 AM - 3:30 PM ✓		Open
ws 008	Open	9:30 AM - 2:30 PM ✓	2:30 PM - 4:30 PM ✓	
ws 009	Open	9:30 AM - 1:00 PM ✓	1:00 PM - 2:45 PM ✓	Open
ws 010	Open	10:00 AM - 4:00 PM ✓		
ws 011	Open	10:00 AM - 4:00 PM ✓		
ws 012	Open	10:00 AM - 12:45 PM ✓	Open	
ws 012b	Open	10:30 AM - 4:30 PM ✓		
ws 014	Open			
ws 015a	Open			

- ❑ Time periods are divided into blocks representing the test appointments for a workstation.
- ❑ The colours indicate whether the test has been delivered, is ready to be delivered, is scheduled or has an unknown status.
- ❑ You can click the checkmark or the A next to an appointment time to view information about the appointment in a separate window.
- ❑ Once you generate a chart for the current day, you can quickly generate it for other days by selecting a date at the bottom of the page and clicking the **Go** button.



## Checking the schedule in Admissions Manager

It is important to check your ITC's schedule frequently using Site Manager, Admissions Manager, or the VSS web site. You cannot change the information as it appears on the schedule, but you can use it to check in advance how many tests you will be delivering throughout the day, which tests candidates will be taking, whether or not candidates require accommodations/special assistance, and other schedule details. It is also important to check the schedule for future days/weeks to be aware of when candidates are scheduled to test at your ITC.

The **Schedule** window in the Admissions Manager application provides details about your ITC's schedule. For security reasons, Admissions Manager should never be left running unattended. When you are done using the application, or if you need to leave your desk, be sure to close it.

When you take a break, go to lunch, end the work day or *leave the ITC for any period of time*, be sure to log out of *all* applications you have logged in to. The test administrator who is currently registering, invigilating and/or administering tests must log into the applications with their personal username and password.



Follow these steps to view the schedule in Admissions Manager:

1. Click the **Start** button on the Windows taskbar and choose **Programs | VUE Applications | Admissions Manager**.

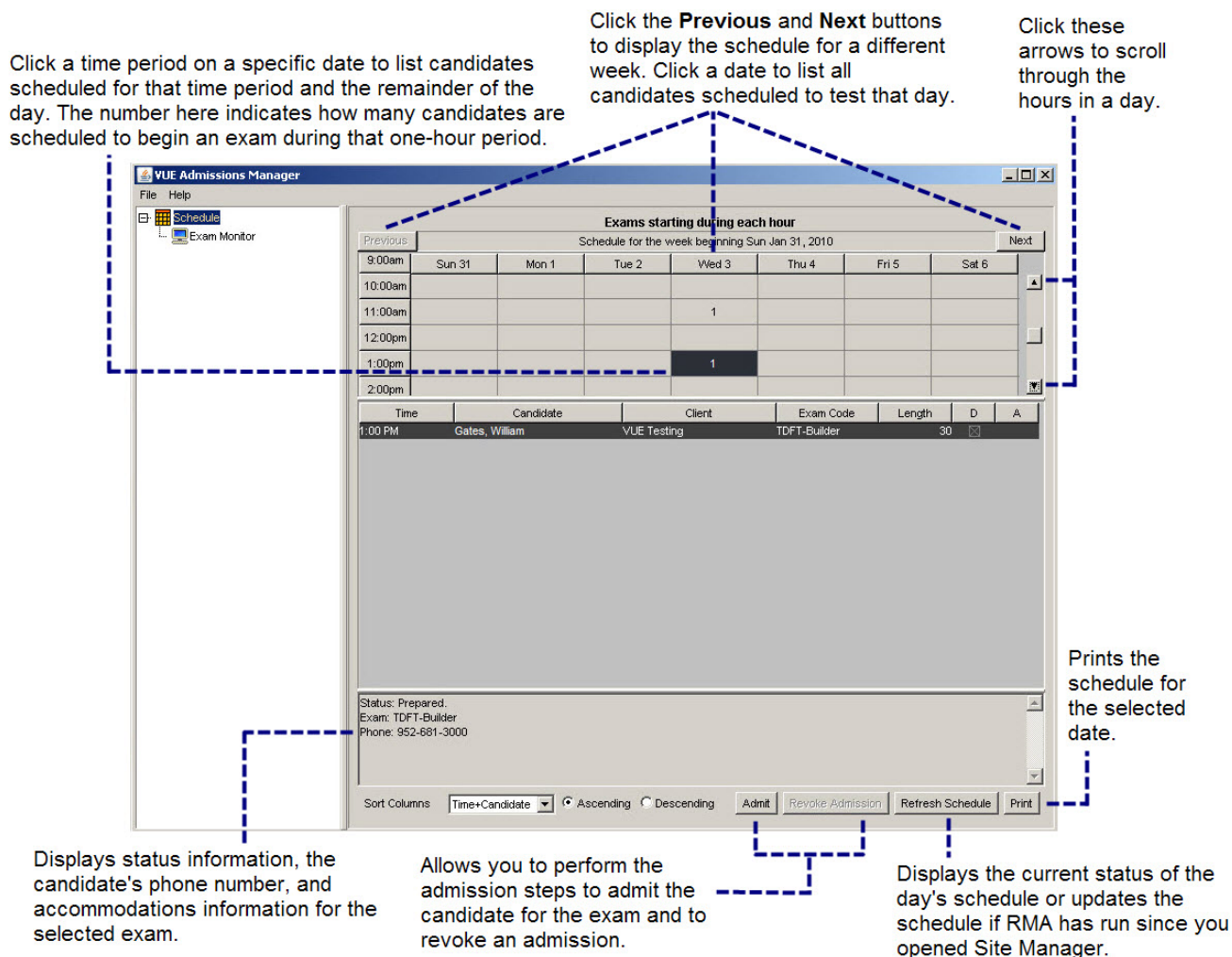
An introductory screen appears, followed by the Login dialog box shown below.



The login dialog box has a title bar 'VUE Admissions Manager - Login'. It contains two input fields: 'User Name:' and 'Password:'. To the right of these fields are three buttons: 'OK', 'Manage Account', and 'Cancel'.

2. In the Login dialog box, type your user name and password for the Pearson VUE applications and click **OK**.

Admissions Manager opens, and the Schedule window is displayed. (If the Schedule window is not displayed, click the **Schedule** icon in the left pane.) The illustration below shows the main features of the window.



The screenshot shows the 'VUE Admissions Manager' window. The left pane has 'Schedule' and 'Exam Monitor' icons. The main area displays a calendar for the week of Jan 31, 2010, with a table of exams starting each hour. The table has columns for time, date, and candidate count. The 1:00pm slot on Wednesday shows a candidate count of 1. Below the calendar is a table for the selected exam (1:00 PM) with columns: Time, Candidate, Client, Exam Code, Length, D, and A. The candidate listed is Gates, William. At the bottom, there is a status section with 'Status: Prepared', 'Exam: TDFT-Builder', and 'Phone: 952-681-3000'. Below this are 'Sort Columns' (Time+Candidate), radio buttons for 'Ascending' and 'Descending', and buttons for 'Admit', 'Revoke Admission', 'Refresh Schedule', and 'Print'.

Click a time period on a specific date to list candidates scheduled for that time period and the remainder of the day. The number here indicates how many candidates are scheduled to begin an exam during that one-hour period.

Click the **Previous** and **Next** buttons to display the schedule for a different week. Click a date to list all candidates scheduled to test that day.

Click these arrows to scroll through the hours in a day.

Displays status information, the candidate's phone number, and accommodations information for the selected exam.

Allows you to perform the admission steps to admit the candidate for the exam and to revoke an admission.

Prints the schedule for the selected date.

Displays the current status of the day's schedule or updates the schedule if RMA has run since you opened Site Manager.

3. Use the **Previous** and **Next** buttons at the top of the schedule to locate the week you want to view. Use the scrolling arrows on the upper right side of the window to scroll through the hours in a day.



The numbers on the schedule indicate how many candidates are scheduled to begin a test during each one-hour period.

**4. To view candidate information for a specific time period, click a date/time slot in the grid at the top of the window.**

When you select a period, the candidates scheduled to start a test during that period and during the subsequent periods on that day are listed.

- Time -- Time at which the candidate is scheduled to begin the test.
- Candidate -- Name of the candidate.
- Client – CITB.
- Exam Code -- The test identification code or number.
- Length -- Length of the test, in minutes.
- D (Deliverable) -- An X in this box indicates that the test is available for delivery. An empty box means the test has not yet been downloaded to your ITC. When checking your schedule each morning, make sure all tests for the day are marked deliverable. If they are not, run RMA manually. If a test is still not deliverable, click the candidate's name to see a status message at the bottom of the window explaining why the test is not available. Then call VSS immediately.

RMA transfers tests from Pearson VUE to your ITC. Tests are transferred as close to the delivery date as possible, to ensure that your ITC has the most current version of the test available. This means that the Deliverable box may not be checked for tests that will be delivered sometime in the future. RMA will transfer the test a day or so before it needs to be delivered.

- A (Accommodations) (Special Assistance) -- The letter "A" appears in this column if accommodations have been granted for the test, for example a foreign language voice over. Click the test to view accommodation details in the Status area at the bottom of the window.
- Status -- As previously noted, you can click a candidate's name on the schedule to see a test status message at the bottom of the window. The most common status messages are listed below. As noted above, the Status area is also used to describe accommodations/special assistance that has been granted for the test.

Status message	Meaning
Prepared	Test ready for delivery. The appointment has been processed by RMA, and the necessary files are available so the test can be delivered.
Appointment scheduled	A future appointment that has not yet been processed by RMA, usually because it is more than seven days in the future.
Event will be ready today or Event will be ready within X days	An appointment for which RMA has selected a test version but has not yet marked as being ready.
Event undeliverable for the following reasons: XXXXX	A test that is undeliverable. For example, the test may have been suspended at the request of CITB.
Admitted	Candidate has been admitted through Admissions Manager but has not yet started the test.
Delivery started	Test is in progress.
Delivered	Test was successfully delivered.

5. **To print a schedule, select a date at the top of the schedule and click the Print button at the bottom of the window. When the Print dialog box displays, choose your options and click OK.**

Schedule information is printed for each time period during the selected day. If no tests are scheduled for that day, a message stating that appears on the printout.

6. **Use the Refresh Schedule button at the bottom of the window to update the status of the tests. If the RMA process has been completed since you opened Admissions Manager, clicking Refresh Schedule updates the schedule with new appointments or other changes.**

## Checking the schedule in Site Manager

It is important to check your ITC's test schedule frequently using Site Manager, Admissions Manager, or the VSS web site. You cannot change the information as it appears on the schedule, but you can use it to check in advance how many tests you will be delivering throughout the day, which tests candidates will be taking, whether or not candidates require accommodations/special assistance, and other schedule details. It is also important to check the schedule for future days/weeks to be aware of when candidates are scheduled to test at your ITC.

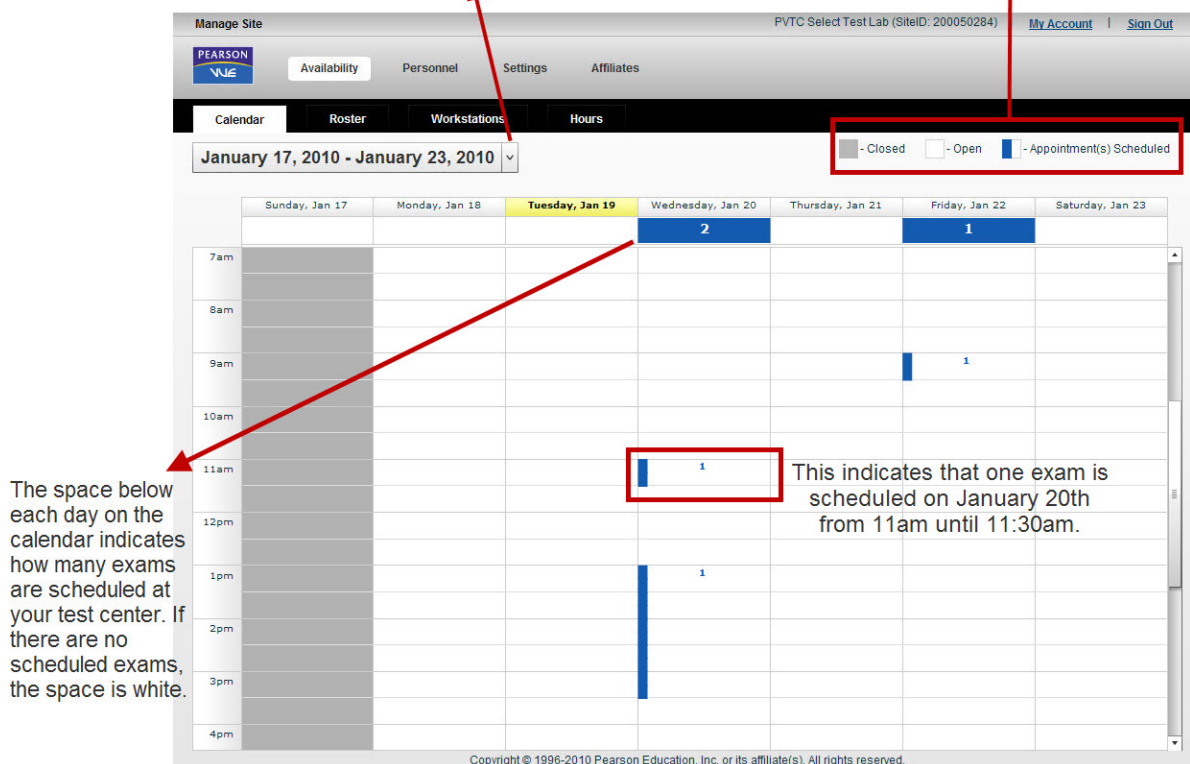
The **Calendar** and **Roster** tabs under the **Availability** category in Site Manager provide details about your ITC's schedule.

## Using the calendar

When you click on the **Calendar** tab under the **Availability** category, a calendar displays showing when appointments are scheduled at your ITC. The image below provides more details about the **Calendar** tab.

Currently, you are viewing the calendar for the week of January 17, 2010 - January 23, 2010. You can switch the view to another week, day, or month by selecting the arrow.

This key helps you to understand your test center schedule on the calendar. Gray or white areas on the calendar indicate when your test center is closed or open. Blue areas are when an exam is scheduled at your test center.



## Changing the calendar view

You can view your ITC's schedule in the calendar by day, week, or month. To change the calendar view, click on the drop-down list located above the calendar.

By default, the current week, highlighted in blue, is displayed in the calendar. You can view the calendar by week, month, or day by selecting the tabs located under the calendar as shown below.

Manage Site P/VTC Select Test Lab (SiteID: 200050284) My Account Sign Out

PEARSON VUE Availability Personnel Settings Affiliates

Calendar Roster Workstations Hours

January 17, 2010 - January 23, 2010

- Closed - Open - Appointment(s) Scheduled

Sunday, January 17, 2010

Monday, January 18, 2010

Tuesday, Jan 19 Wednesday, Jan 20 Thursday, Jan 21 Friday, Jan 22 Saturday, Jan 23

7am 8am 9am 10am 11am 12pm 1pm 2pm 3pm 4pm

January 2010

S M T W T F S

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Day Week Month

Cancel Apply

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After you select a view, you can then pick which day(s) you want displayed depending on which view you selected. Once you select the days, they are highlighted in blue. For example, if you select the monthly view, the entire month is highlighted in blue.

After you select the view and days you want displayed, click **Apply**. The calendar will display the view settings you specified.

Clicking the **Apply** button also refreshes your ITC schedule on the **Calendar** tab if RMA has run since you opened Site Manager.

## Using the Roster

The **Roster** tab in the **Availability** category displays a list of candidates who are scheduled for a test at your ITC on a specific day.

Manage Site PVTC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

PEARSON VUE Availability Personnel Settings Affiliates

Calendar **Roster** Workstations Hours

January 22, 2010 Details Print

☐ ☐ All Clients All Times Filter Search

Start Time	1. First/Middle Names	Last Name	2. Client	Exam Code	Length	Phone	Accommodations
9:00AM	Mai	Xiong	VUE Testing - 2K2	TDFT-Oracle	30	952-681-3000	0

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By default, the roster displays all candidates scheduled for a test on the current day in a table format. You can view the roster for another day by selecting the day from the drop-down list located at the left side of the screen.

Manage Site PVTC Select Test Lab (SiteID: 200050284) | [My Account](#) | [Sign Out](#)

PEARSON VUE Availability Personnel Settings Affiliates

Calendar **Roster** Workstations Hours

January 22, 2010 Details Print  
 January 21, 2010  
 January 22, 2010  
 January 23, 2010  
 January 24, 2010  
 January 25, 2010

☐ ☐ All Clients All Times Filter Search

Start Time	1. First/Middle Names	Last Name	2. Client	Exam Code	Length	Phone	Accommodations
		Xiong	VUE Testing - 2K2	TDFT-Oracle	30	952-681-3000	0

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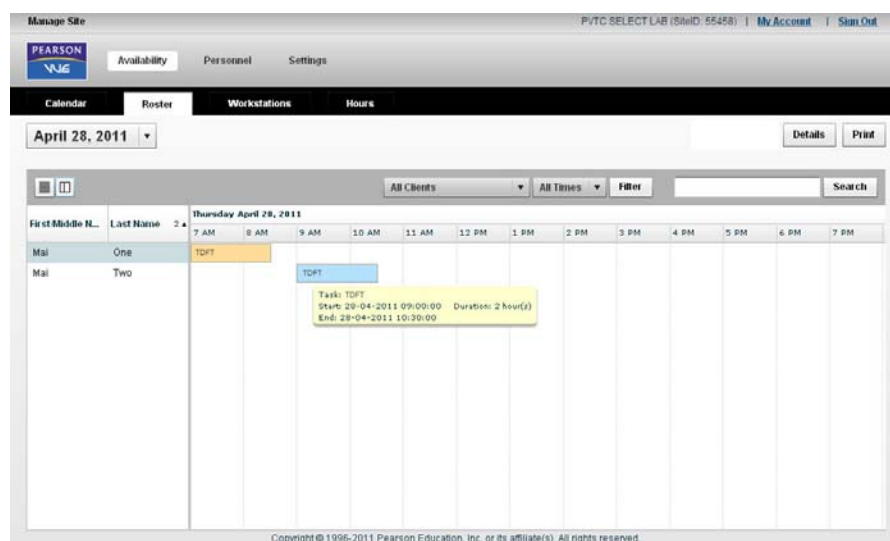
## Viewing the Roster List

The roster includes the following information about a candidate scheduled at your ITC:

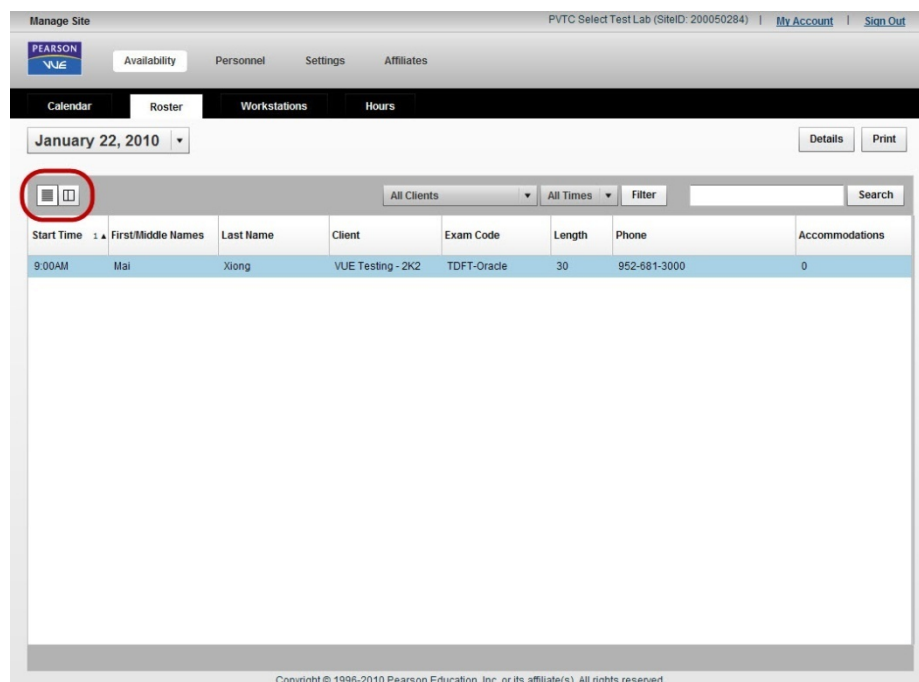
- **Start time** -- Time at which the candidate is scheduled to begin the test.
- **First/Middle Names** -- First and middle name of candidate.
- **Last Name** -- Last name of candidate.
- **Client** – CITB.
- **Exam Code** -- Test identification code or number.
- **Length** -- Length of the test.
- **Phone Number** -- Candidate's phone number.
- **Accommodations** -- Approved accommodations/special assistance for the candidate.

By default, the roster is organised by Start Time and Last Name. You can sort the roster in ascending or descending order by any of the columns. To do this, click the column name once or twice and an arrow pointing up (ascending) or down (descending) appears with the column name. To sort the roster by more than one column, hold down the **Ctrl** button on the keyboard and select another column on the screen. A number will appear next to the column name indicating which column the roster is being sorted by first to last. You can also expand the columns by clicking and dragging the right or left edge of the column name.

You can view more information about a scheduled candidate in the **Roster** tab by balancing the mouse pointer on the right side of the pane, and then clicking and dragging to the left. This pane provides a detailed view of the ITC schedule for the selected day. Hovering over a scheduled appointment will display further information about the test appointment as shown below.

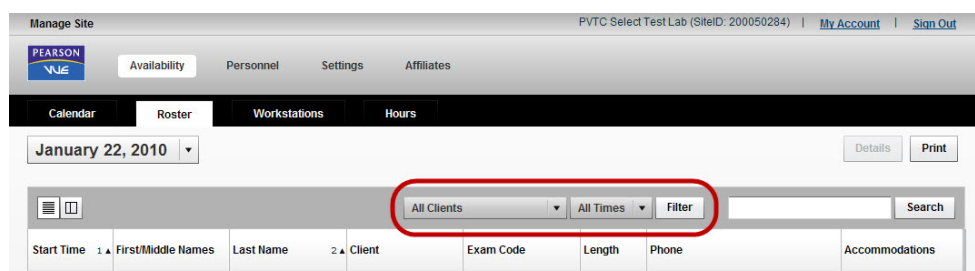


You can also select the Detailed View icon (right icon) above the **Start Time** column if a candidate is already selected in the roster (see the image below). Selecting the List View icon (left icon) hides the pane.



## Filtering and searching in the Roster

There is a feature in the **Roster** tab that you can use to filter the list to only show candidates scheduled for certain test and times. This can be done by using the drop-down lists indicated in the image below. Only clients and times with candidates scheduled at your ITC on the specified day can be selected from the drop-down lists. After you select CITB and/or time, click the **Filter** button, and the filter generates the list on the **Roster** tab.



Next to the **Filter** button is the Search feature which allows you to search for candidates in the roster by first, middle, or last name.

## Other Roster features

Above the Search feature are the following two buttons:

- **Details** - This button allows you to view more details about a candidate. First select the candidate on the roster, and then click the **Details** button. The Appointment Details screen displays and provides more information, such as the Registration ID, Status, Test Name, List of Accommodations, and Delivery Assistance.
- **Print** - This button allows you to print the roster for the selected day. Site Manager will print the roster list in the order you have sorted the list on the screen.

## Testing admissions data equipment

The administration workstation contains a simple application called **Test Admissions Equipment** that lets you verify if the admissions devices are working properly. Please test these devices at least once per week AND on the day you know you are going to use them. Follow these steps to perform the tests:

1. **Click the Start button on the Windows taskbar and choose Programs | VUE Applications | VUE Support Tools | Test Admissions Equipment.**

The **Test Admissions Equipment** window appears.

2. **Choose an admissions data type from the drop-down list, and then click the “Test” button.**

Different windows will appear depending on which equipment you are testing. Follow the instructions on the screen to test the equipment.

3. **Once you have tested all the equipment, click the Close button at the top right corner of the window to end the application.**

If you were unable to obtain an admissions data capture using the equipment, contact VSS immediately to report the problem.

## Daily shutdown tasks

At the end of the testing day, you need to compile and file any special forms or files that were used during the day. These include any test logs or waiver forms collected during the admissions process.

The *Daily Shutdown Checklist* provides all tasks that must be completed at your ITC at the end of every business day. The VSS web site contains a copy of the list that you can duplicate and keep at the front desk for easy reference.

## Running RMA

Run the RMA application at the end of each day on which testing occurs, if your ITC does not use the Pearson VUE Application Wrapper service to automate it.



When the RMA application is run, it automatically transfers candidate test results to Pearson VUE. ITC's are contractually obligated to return results to Pearson VUE on the same day tests are delivered. ITCs may be suspended until all results are returned. Please be sure that RMA is run daily.

## **Test Logs, Parental Consent Forms, Waiver Forms and Candidate Rules Agreements**

At the end of each testing day, you need to compile and file the ITC Test Logs and any Parental consent forms or Waiver forms. These forms are available on the Downloads page of the VSS web site, along with the Candidate Rules Agreement.

File each day's set of forms by date in a secure place. Your ITC must keep these forms on file for a minimum of 2 years and ensure they are available for auditing purposes.

## **Filing and updating Incident Reports**

Verify that incident reports for all incidents that occurred during the day have been filed properly, even if VSS or someone else at Pearson VUE filed the incident.

## **Forms and checklists**

Included in the list below are titles of forms and checklists that are mentioned throughout the ITC Policies & Procedures Guide and used at the ITC. You can download them from the Downloads page on the VSS web site.

- ❖ Daily Startup Checklist
- ❖ Daily Shutdown Checklist
- ❖ Candidate Check-in List
- ❖ Candidate Sign-out Checklist
- ❖ Candidate Rules Agreement
- ❖ ITC Test Log
- ❖ Waiver Form
- ❖ Under 16's Parental Consent Form
- ❖ Pearson VUE Assistive Personnel Rules
- ❖ Pearson VUE™ Authorised Centre Responsibilities