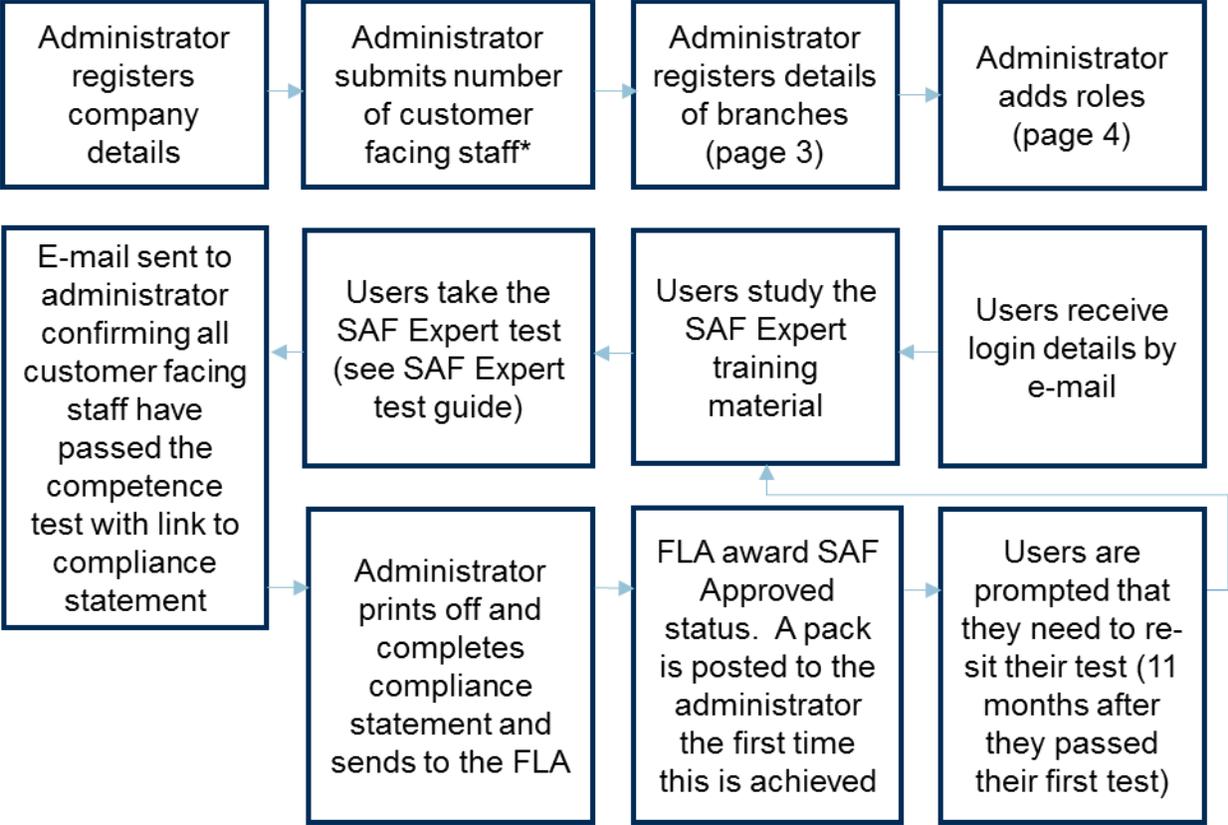# SAF Expert Test - Administrator Guide

This guide aims to assist administrators with using and maintaining the SAF Expert test site accessed when the 'register' or 'login' buttons at the top of the SAF website are clicked. It also shows administrators how to obtain reporting information about their staff.

Contents

SAF Expert process

Administrator registers company details	→ Administrator submits number of customer facing staff*	→ Administrator registers details of branches (page 3)	→ Administrator adds roles (page 4)

E-mail sent to administrator confirming all customer facing staff have passed the competence test with link to compliance statement	← Users take the SAF Expert test (see SAF Expert test guide)	← Users study the SAF Expert training material	← Users receive login details by e-mail

	Administrator prints off and completes compliance statement and sends to the FLA	→ FLA award SAF Approved status. A pack is posted to the administrator the first time this is achieved	→ Users are prompted that they need to re-sit their test (11 months after they passed their first test)

*All customer facing staff involved in the sale of motor finance are required to take and pass the SAF Expert test for their firm to become SAF Approved.

Administrator's maintenance page

As a Master Administrator you are responsible for:

1. Setting up accounts and accessing all SAF Expert reports for your company.
2. Maintaining details of individual users to ensure tests are retaken annually and staff details are up to date.
3. Responding to any technical difficulties raised by staff.
4. Application and renewal of SAF Approved status.

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

Branch Maintenance

Use the Branch function to set up departments or locations for your company, e.g. Head office or London office. There is a default "Head Office" branch already set up. If your firm only has one branch, you do not need to add any new branches.

To add branches:
   1. Click on Administration
   2. Click on Branch Maintenance
   3. Click on add new branch and enter details

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

You can also edit the names of existing branches whilst in the branch maintenance page.

Role Maintenance

Use the role maintenance function to set up job roles for your staff, e.g. Sales Executive or Business Manager.

Some roles may not be required to take the test (such as training/HR roles) but may still require an account for administration and reporting. Please ensure that the "Modules" box is checked for the roles that DO require the SAF Expert test.

To add roles:
   1. Click on Administration
   2. Click on Role Maintenance
   3. Click on "add a new role" and enter details
   4. If the role is one that is required to take the test, tick the check box next to "Modules – Specialist Automotive Finance Expert test"

Please note that by default, the Master Administrator role does not have the

SAF Expert test assigned. If the Master Administrator is required to take the test, you will need to edit this role and assign the test.

User Maintenance

1. Administrator:

Branch administrators can:
- register/de-activate user accounts
- unlock failed assessments
- update email addresses and reset passwords only for the branch assigned to them

Organisation administrators can:
- register/de-activate user accounts
- unlock failed assessments
- update email addresses, reset passwords, create and amend roles, branches and users assessment details for all users in company

Master Administrators

Each company has **only one Master Administrator**. To change the Master Administrator, please ensure the new Master Administrator has been set up with 'Organisation Administration' and 'Organisation Monitor' status and email info@proficiencysolutions.co.uk to advise they should be set as the Master Administrator.

2. Monitor:

Branch and organisation monitors can view the reports and test records for either the Organisation or Branch depending on level of access granted.

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

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

Add a new user:

1. Click on Administration
2. Click on User Maintenance
3. Click on "add new user"
4. Enter the individual's details - remember to include an email address if possible. You can also choose to make this person an administrator and/or monitor at the stage if you wish
5. Press Submit

If the user does not have an email address, please make sure you provide these to them securely. If you have entered an email address for the individual, their log in details will be emailed to them.

Edit individual user details:

1. Click on Administration
2. Click on User Maintenance
3. Search for the individual you wish to amend via the "Last name" filter
4. Click on "edit" by the individual that you wish to amend. You will then be able to change details

Please email Proficiency Solutions at info@proficiencysolutions.co.uk to request amendments to user's names.

Deactivating individuals on SAF Expert test site:

1. Click on Administration
2. Click on User Maintenance
3. Search for the individual that you require via the "Last name" filter
4. Click on edit next to their name
5. On their profile untick "Active?"

Please email Proficiency Solutions at info@proficiencysolutions.co.uk to request re-activation of user accounts.

Individuals who have been deactivated will not show on any reports unless the report is filtered to "Any" or "Not Active".

Applying for SAF Approved status

On the welcome screen, you will be asked to enter the number of customer facing staff in your organisation that are required to take the test (eligible staff).

Please note, if the number of eligible staff changes throughout the year, please contact the SAF team at saf@fla.org.uk or Proficiency solutions at info@proficiencysolutions.co.uk to amend this. Once the number of test passes achieved reaches the eligible staff figure the administrator receives an e-mail detailing how to apply for SAF Approved status.

To ensure the firm becomes SAF Approved the administrator should:

1. Print off the relevant compliance statement linked to in the e-mail
2. Complete the compliance statement and ensure it is signed by the relevant authority
3. Either scan and e-mail, post or fax to the details provided on the statement
4. If necessary, indicate when sending the compliance statement if the "Eligible staff" figure the administrator initially reported on the home page is still correct. "Eligible staff" refers to the number of customer facing staff involved in the sale of motor finance that are required to take the SAF Expert test
5. Assuming all the details provided are correct and correspond to what is showing on SAF the FLA will then award SAF Approved status. First time SAF Approved firms will receive a SAF pack with plaque, hand written certificate, stickers and a SAF Expert badges. The Master Administrator can also download and print an electronic version of their SAF Approved certificate from the home page of their SAF account
6. When awarded SAF Approved status the dealers details will be added to the FLA's Financing Your Car dealer directory allowing consumers to find their nearest SAF Approved dealers

Guide to Reports

Reports can only be accessed by users who have been set up with "Monitor" privileges.

A "Branch monitor" can only view the reports for staff within their own branch and an "Organisation Monitor" can view the reports for all staff registered on the account.

The system provides the following reports:

Progress Report

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

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

Topic Analysis Report

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

Test Activity

This report shows you the last 50 tests taken and their outcome. Click on the individuals "Details" tab to see full coaching report, this shows you the individuals score and a topic analysis report detailing how they scored in each topic allowing you to develop a personalised training plan.

Test Status Report

This report will show you staff who have either not yet taken/passed the SAF Expert test, along with those whose test has expired or is due to expire within the next 30 days. Click on the individuals name for to view their full test history.

Module Completion

This report is downloaded onto an Excel spreadsheet and details all of your staff with their current test status and date of activity. You can filter to show a particular branch or to view "active", "inactive" or "any" users.

Export data

Allows you to export your data to an Excel spreadsheet.

Useful test features

How to: Access individuals test results:

Under reports section, open the "Progress report", click on the individual's details link under test history. Click on details of most current test date to see a report of percentage of pass /fail and also how well each individual topic within the test was tackled.

How to: Find out who has not taken the test/whose test has expired:

Under reports section, open the "Test Status report", from here you can click on the individual's details to see if they have attempted the test and what areas they may need additional training on.

How to: Identify the training requirements of your company:

Under the reports section, open the Topic Analysis Report. Areas on this report that are highlighted in red indicate a severe lack of knowledge and require further training.

Support for users

Users should contact their company Master Administrator with queries in the first instance. They can find a list of administrators in their company who may be able to help listed under "Support" on the menu.

If the Master Administrator cannot help, or you are the Master Administrator and need further assistance select one of the following contact methods:

If your enquiry relates to **maintenance and user accessibility** of the SAF Expert test site contact Proficiency Solutions: 0344 543 1149 or info@proficiencysolutions.co.uk

For **more information** about SAF go to www.specialistautomotivefinance.org.uk

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