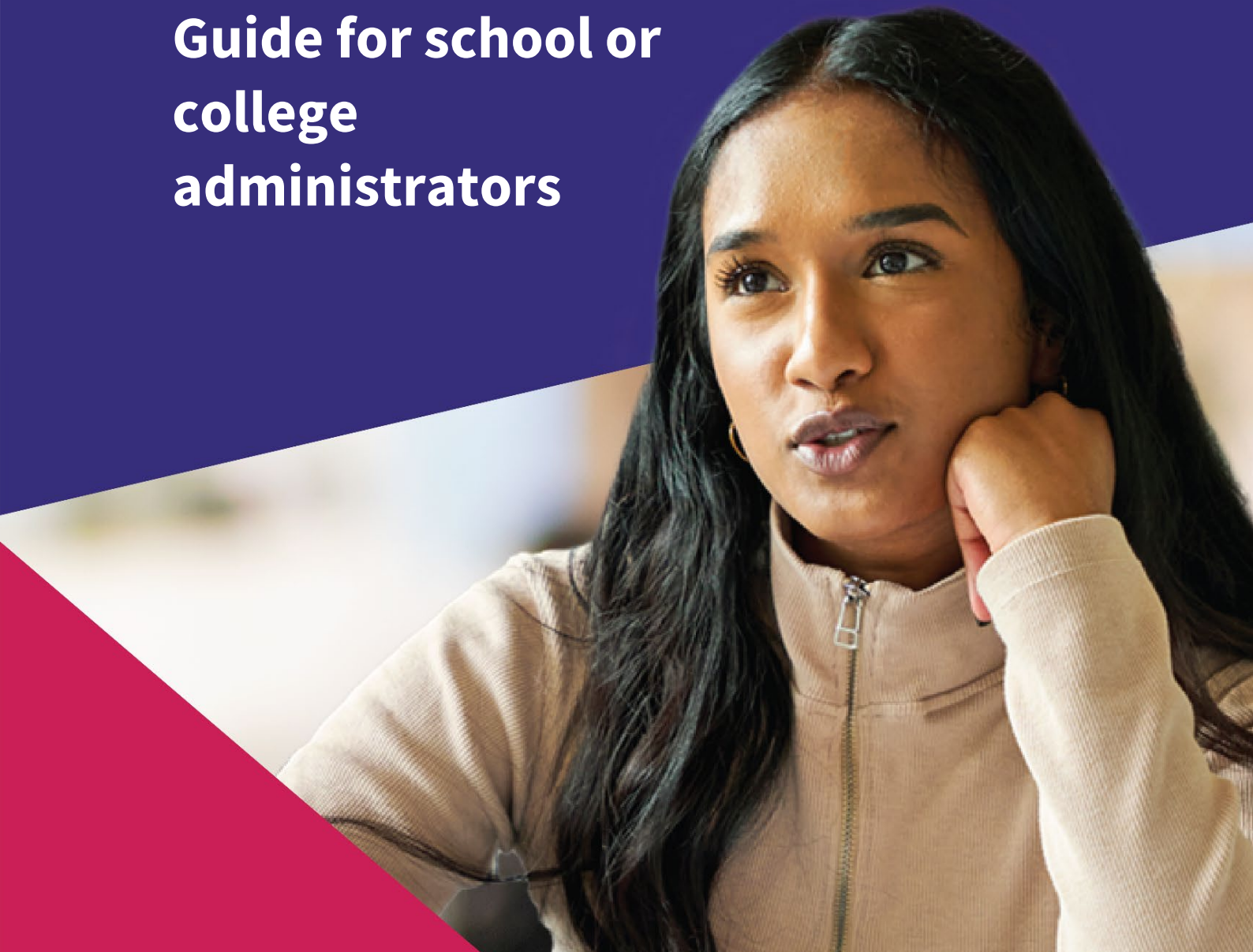


AQA FINANCIAL FUTURES

**Guide for school or
college
administrators**



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Purpose

This guide is for school or college administrators using the AQA Financial Futures platform.

It explains how to set up and maintain the centre structure, manage learner accounts and classes, communicate with teachers and learners, and access progress and assessment reports.

It is intended for colleagues who have been assigned the school or college administrator's role. Use this guide as a practical reference to help you manage the platform confidently and know where to go for support if you need it.

Short videos summarising some of the key aspects of the AQA Financial Futures platform are available at [AQA Financial Futures](#).

Before you start

You will need access to a device with an up-to-date web browser (Google Chrome or Microsoft Edge are recommended) and a reliable internet connection. It is recommended that you use a desktop or laptop device. Financial Futures can be accessed on any device, but assessments must be completed on a screen 10 inches or bigger.

AQA will register your school email address; please check your inbox or junk email for a message from: noreply@aqafinancialfutures.co.uk

You may need to verify with your IT team that the URLs and the email address below are added to your network's allow list:

The Financial Futures application (Email address)

- noreply@aqafinancialfutures.co.uk

Financial Futures Platform (Teachers)

- <https://admin.aqafinancialfutures.co.uk/>

Financial Futures Platform (Learners)

- <https://www.aqafinancialfutures.co.uk>

The Surpass assessment player

<https://alphaplus.surpass.com>

Checklist before starting:

- ✓ Check the internet connection is working normally.
- ✓ Check that you have received your account email and one-time password.
- ✓ Have a mobile device available to set up multi-factor authentication (MFA).
- ✓ Use an individual administrator account. Do not share sign-in details.
- ✓ Keep learner information secure and only download or share reports where there is a legitimate need.

Getting help

Please contact AQAFinancialFutures@aqa.org.uk if you require support or have queries that are not covered in this guide.

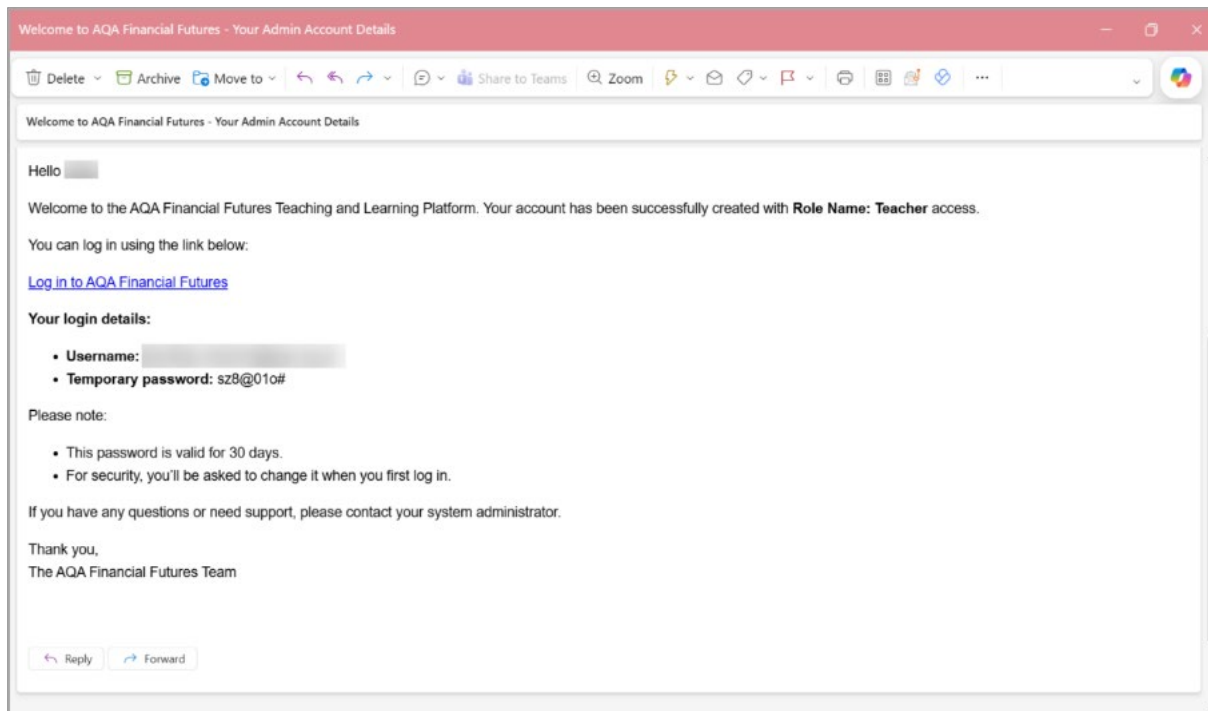
Registering and sign in

AQA will arrange access to your administrator account. You will receive a username and one-time password by email. The password is valid for 30 days. The email will come from noreply@aqafinancialfutures.co.uk.

Please check your junk mail if this is not in your inbox.

Signing in

The welcome email from noreply@aqafinancialfutures.co.uk looks like this:



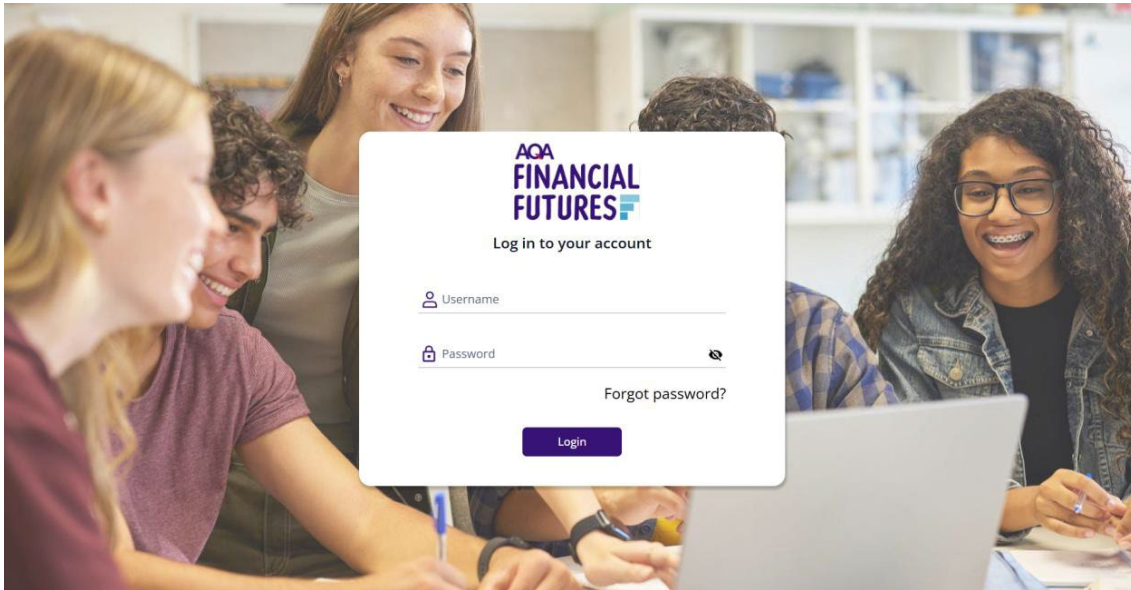
You can access the Financial Futures administrator and teacher login page using the link from the email or at: <https://admin.aqafinancialfutures.co.uk/>

Step 1: Enter the username and one-time password from the email, then select Login.

Step 2: On the Password Reset page, enter the one-time password as the current password.

Step 3: Create and confirm your new password. It must contain at least eight characters, one number and one special character for example Alpha22!

Step 4: Select Save and sign in with your new password.



Set up multi-factor authentication

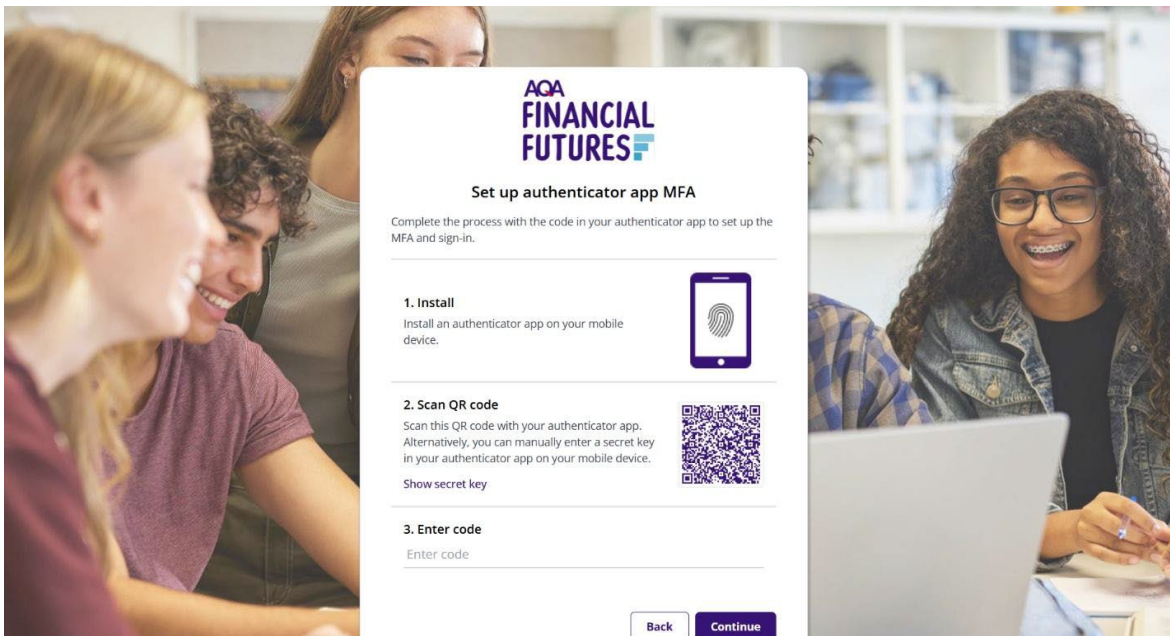
After the password is changed, the Set up authenticator app MFA screen is displayed. MFA is required for administrator roles and can be configured on one mobile device at a time.

Step 1: Install a supported authenticator app, such as Microsoft Authenticator or Google Authenticator.

Step 2: Scan the QR code shown on screen. If scanning is not possible, select Show secret key and enter the key manually.

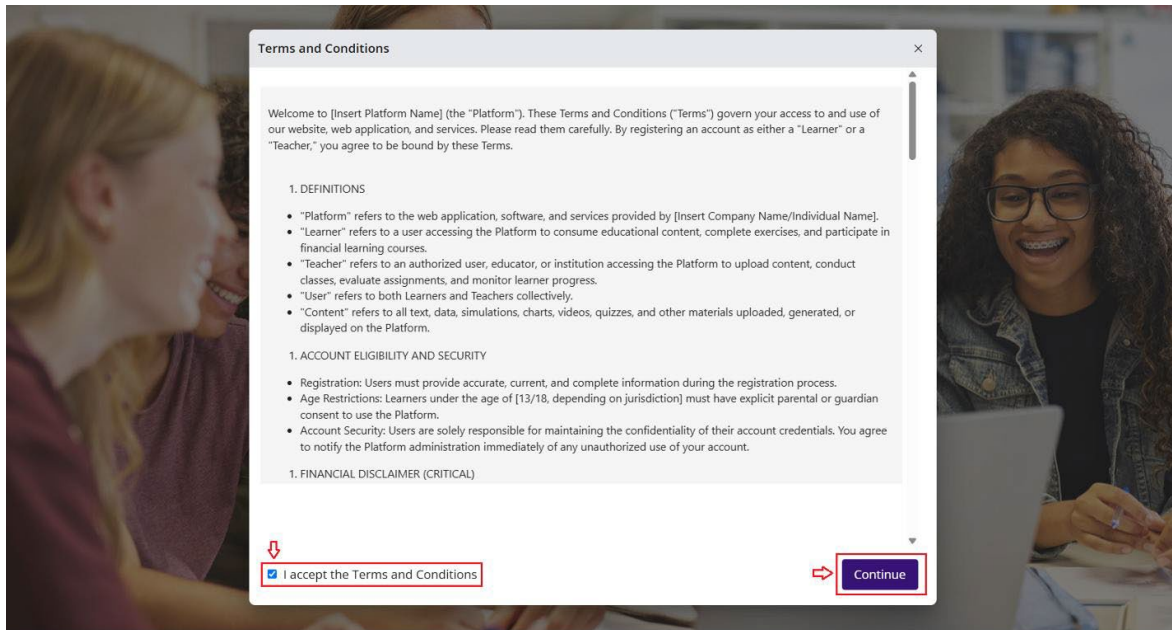
Step 3: Enter the verification code generated by the authenticator app.

Step 4: Select Continue.



Step 5: Scroll down to read the full Terms and Conditions, select the checkbox to confirm you accept them, then select Continue.

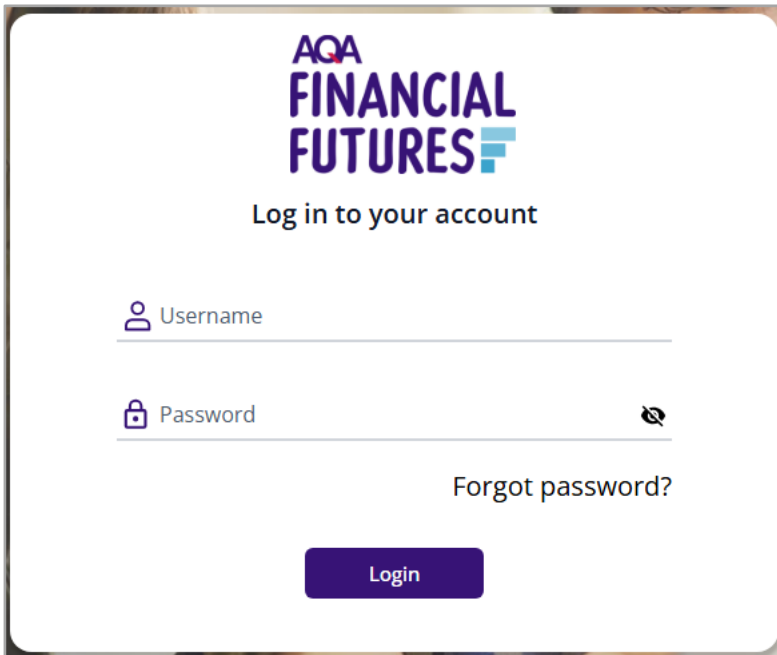
GUIDE FOR SCHOOL OR COLLEGE ADMINISTRATORS



Forgotten password

If you forget your password, please follow these steps:

Step 1: On the login page, select Forgot password?

A screenshot of the AQA Financial Futures login page. At the top is the AQA Financial Futures logo. Below it is the text "Log in to your account". There are two input fields: "Username" with a person icon and "Password" with a lock icon and a toggle for visibility. Below the password field is a link that says "Forgot password?". At the bottom is a purple "Login" button.

Step 2: Enter the email address registered to your Financial Futures account and select Submit.

A screenshot showing a group of four diverse students (three girls and one boy) smiling and looking at a laptop. Overlaid on the image is a white modal form for "Forgot password". The form has the AQA Financial Futures logo, the text "Forgot password", an input field with a lock icon and the placeholder "Enter email", and two buttons: "Submit" and "Cancel".

Step 3: Check your inbox and junk or spam folder for the reset email. If it does not arrive, contact AQAFinancialFutures@aqa.org.uk

Step 4: Follow the instructions in the email. Return to the login page and enter the new temporary password, then create and confirm your new password. It must contain at least eight characters, one number and one special character, for example Alpha22!

Password reset













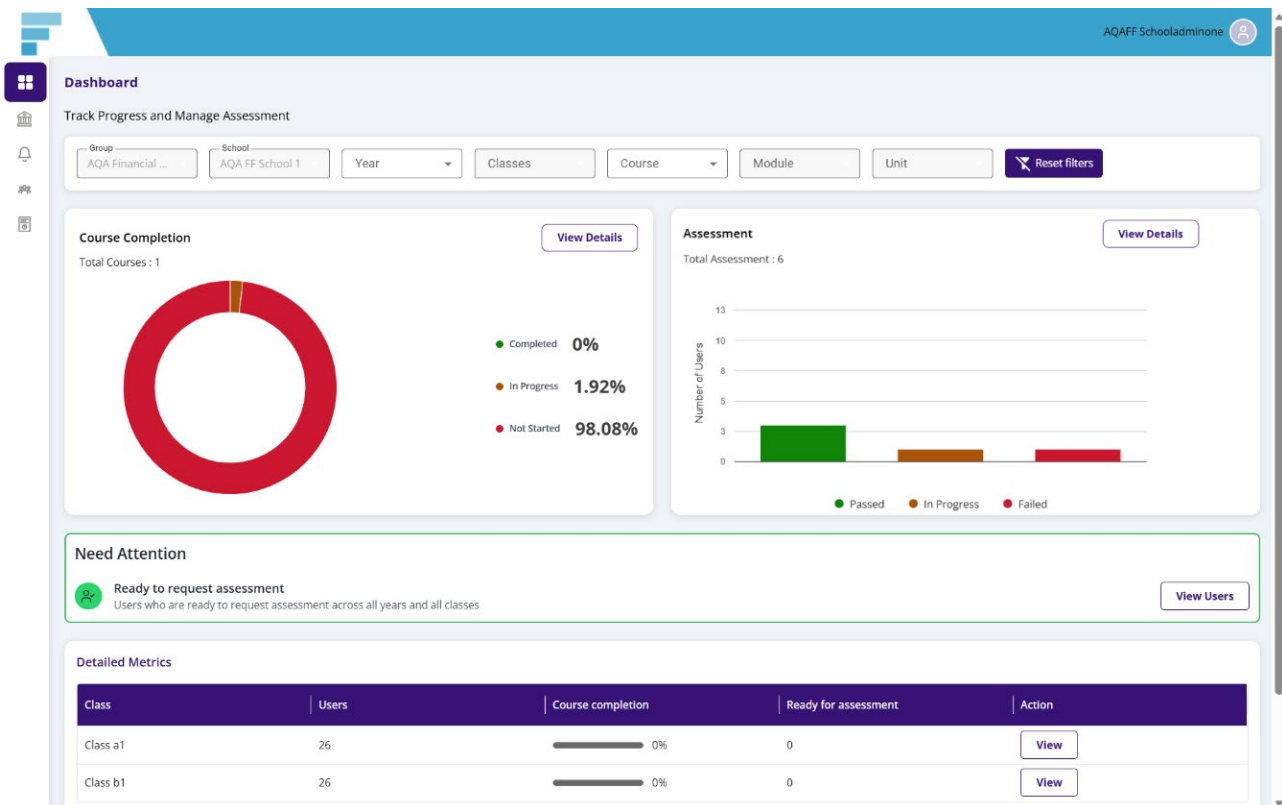
*Password should be at least 8 characters, contain at least one number & one special character.

Save

Finding your way around

After signing in, you will see your Dashboard where you can see an overview of learner progress and assessment activity. The left-hand navigation provides access to Dashboard, Years, Engage and Reports.

- **Dashboard:** View learner progress, course completion and assessment readiness at a glance, items requiring attention and detailed class metrics.
- **Years:** Access and manage academic years, learners, classes, content and activity data.
- **Engage:** Send emails and notifications to learners and year groups.
- **Users and Roles:** View user accounts and understand the role assigned to each person, including administrator, teacher and learner access.
- **Reports:** Analyse learner engagement, progress and assessment performance and export report data.



Dashboard filters

Use the filters at the top of the Dashboard to narrow the information shown. Available filters include group, school, year, class, course, module and unit. Select Reset Filters to return to the default view.

Dashboard

Track Progress and Manage Assessment

Group: User-Guide Gr... School Year Classes Course Module Unit [Reset filters](#)

Dashboard information

- Course Completion shows the proportion of learning that is completed, in progress or not started. Select View Details for more information.
- Assessment shows assessment availability and completion information.
- Need Attention identifies users who may require administrative review, including learners ready to request an assessment.
- Detailed Metrics provides class-level information, including users, course completion and assessment readiness.

[Home](#) > [Course Completion](#)

Course Completion

Group: User-Guide Gr... School Year Classes Course Module Unit [Reset filters](#)

Total Courses: 2

Completed: 1 (4.76% Completion)

In Progress: 1 (4.76% Completion)

Not Started: 19 (90.48% Inactive)

Course Overview

Course(s) Performance

Legend: Completed (Green), In Progress (Orange), Not Started (Red)

User Guide Course: 0% Completed, 4.76% In Progress, 90.48% Not Started

User Guide Course: 0% Completed, 0% In Progress, 100% Not Started

Courses Detailed Metrics

Legend: ≥ 70% Completion & ≥ 80% Started (Green), ≥ 40% Completion or ≥ 50% Started (Orange), < 40% Completion or < 50% Started (Red)

Status	Courses	Users	Completed	In progress	Not started	Completion rate
Red	User Guide Course	21	1	1	19	4.8%
Red	User Guide Course	21	1	0	20	4.8%

< 1 > Show 10

Need Attention

Ready to request assessment

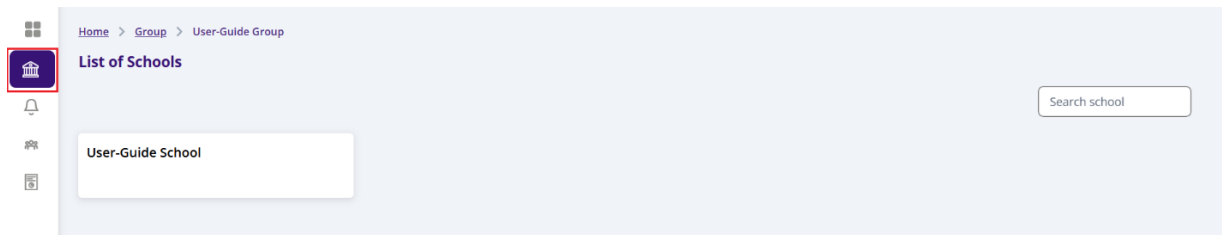
Users who are ready to request assessment across all years and all classes

[View Users](#)

Managing years

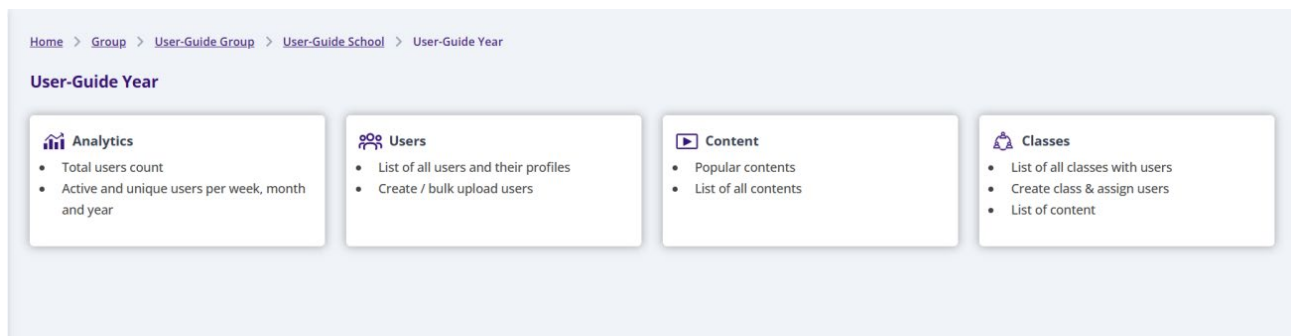
Use Years to access the centre structure and maintain academic years. Select the relevant group or centre, then open the required year.

The AQA administrator creates all class, teacher and learner accounts. If you need to add or remove a class, teacher or learner, please contact AQAFinancialFutures@aqa.org.uk



Open a year

Select a year card to access Analytics, Users, Content and Classes for that academic year.



Managing learners

From the selected year, open Users to view and manage learner accounts. The page shows learner identifiers, usernames, email addresses, roles and recent activity.

Home > Group > User-Guide Group > User-Guide School > User-Guide Year > Users

Users

21 Total Users 1 Active Today

All Users Bulk upload Create user Download format

Learner UPN	User name	Email	User role	Last active	Edit user	Delete user
A132	Test10 User	testuser102026@	User	-		
A133	Test11 User	testuser112026@	User	-		
A134	Test12 User	testuser122026@	User	-		
A135	Test13 User	testuser132026@	User	-		
A136	Test14 User	testuser142026@	User	-		

Create one learner

Step 1: Select Create user.

Step 2: Enter the learner UPN, first name, last name and email address.

Step 3: Select the class and complete any other required fields.

Step 4: Select Save.

Fields marked with an asterisk are mandatory. Check details carefully before saving to avoid duplicate or incorrect records.

Create User

Learner UPN

First name*

Last name*

Email*

School*
User-Guide School

Year*
User-Guide Year

Class

Gender

Cancel Save

Edit a learner

Step 1: Find the learner in the All Users list.

Step 2: Select the Edit User.

Step 3: Update the required information and select Update or Save.

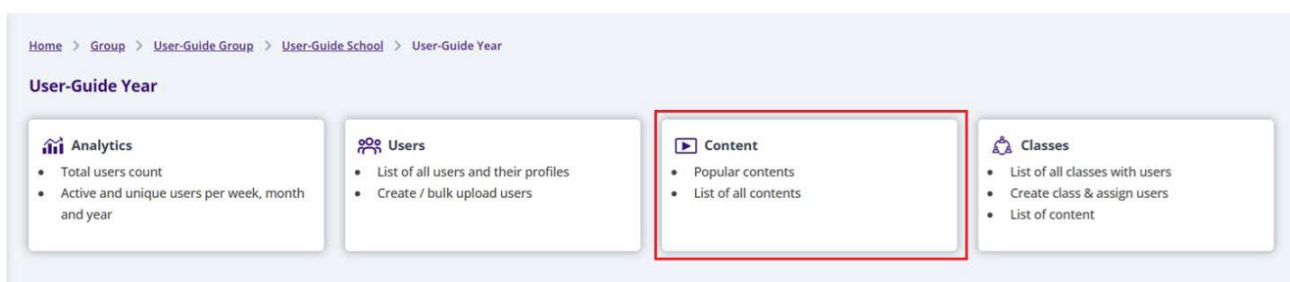
Delete a learner

Deleting a learner permanently removes the account and associated progress. Check that deletion is appropriate before continuing. If unsure then check with the AQA administrator.

Step 1: Find the learner and select the Delete User.

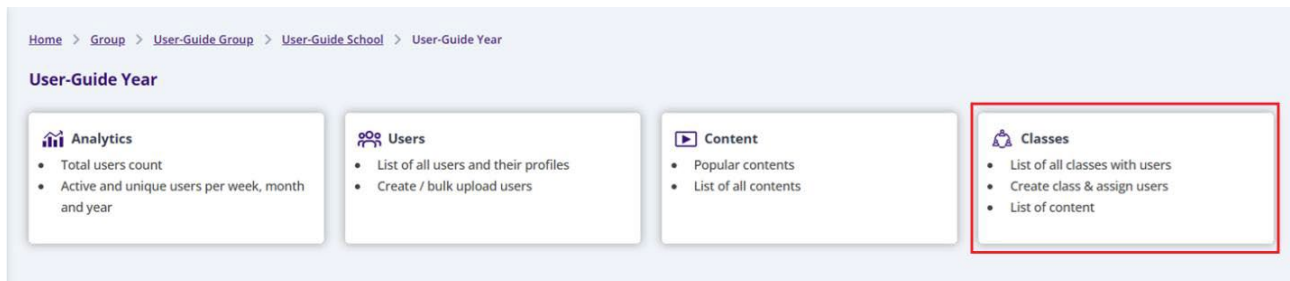
Step 2: Review the confirmation message.

Step 3: Select Yes to delete, or No to cancel.



Managing classes

Open Classes within the selected year to create classes and manage class membership.



Assign learners to a class

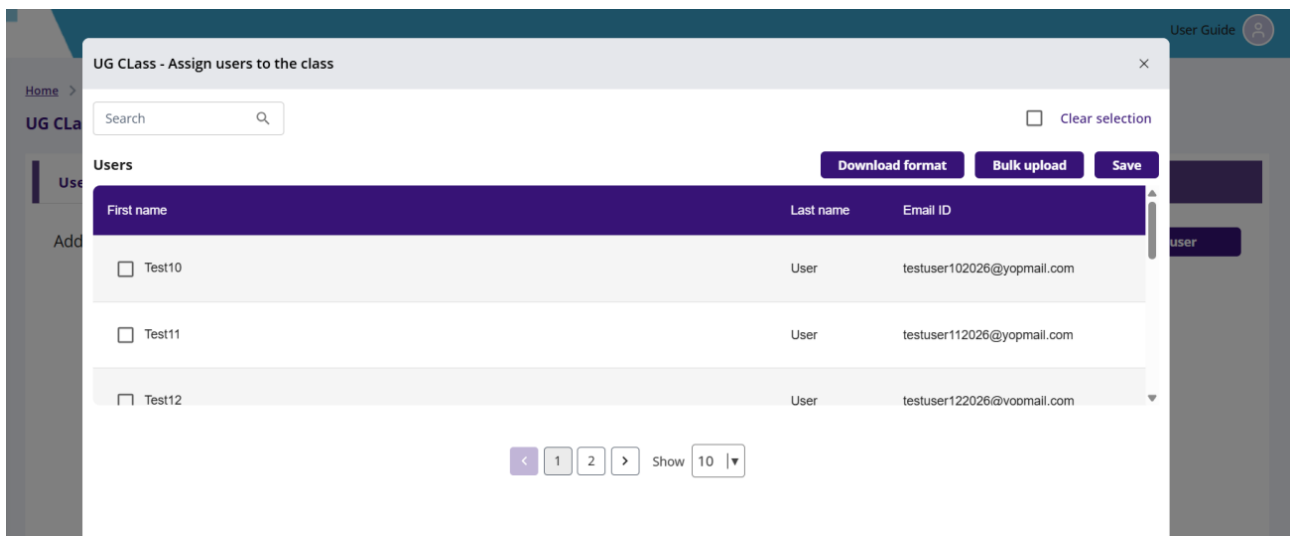
Step 1: Select the class name.

Step 2: Select Assign/Remove User.

Step 3: Search for learners if required.

Step 4: Select the learners to add and select Save.

For larger groups, use Download format and Bulk upload in the assignment window. Complete the downloaded template and upload it without changing the required structure.



Remove learners from a class

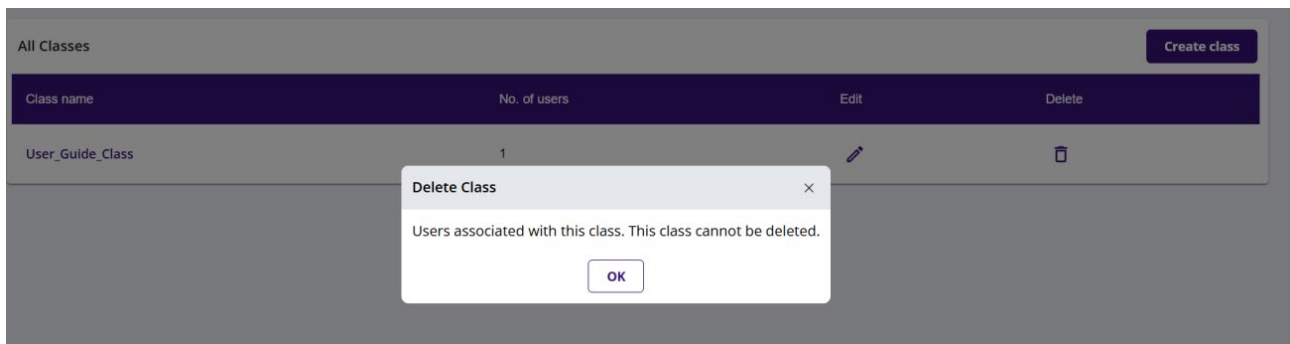
Step 1: Open Assign Users to the Class.

Step 2: Clear the checkbox for each learner who should be removed.

Step 3: Select Save. Removing a learner from a class does not delete the learner account.

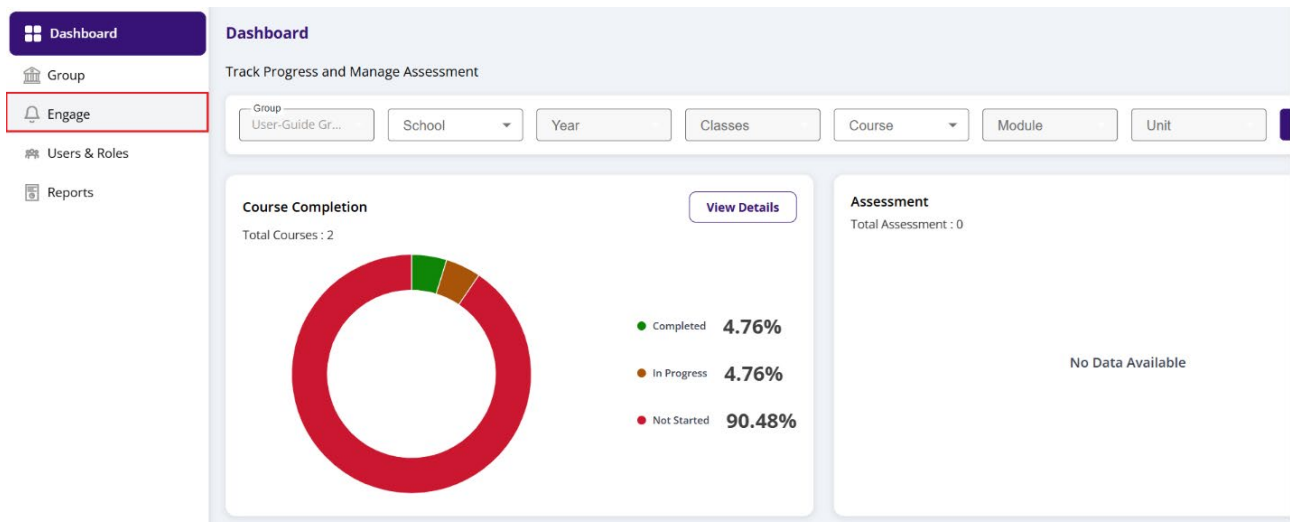
Edit or delete a class

- To rename a class, select the Edit, update the class name and select Update.
- To delete a class, select the Delete and confirm the action. A class cannot be deleted while learners are assigned to it.



Sending notifications

Engage allows school / college administrators to send messages by email, in-platform notification, or both. Messages can be sent to a whole year group or selected users.



Send to a year group

Step 1: Open Engage.

Step 2: Select the required group and school.

Step 3: Select the relevant year.

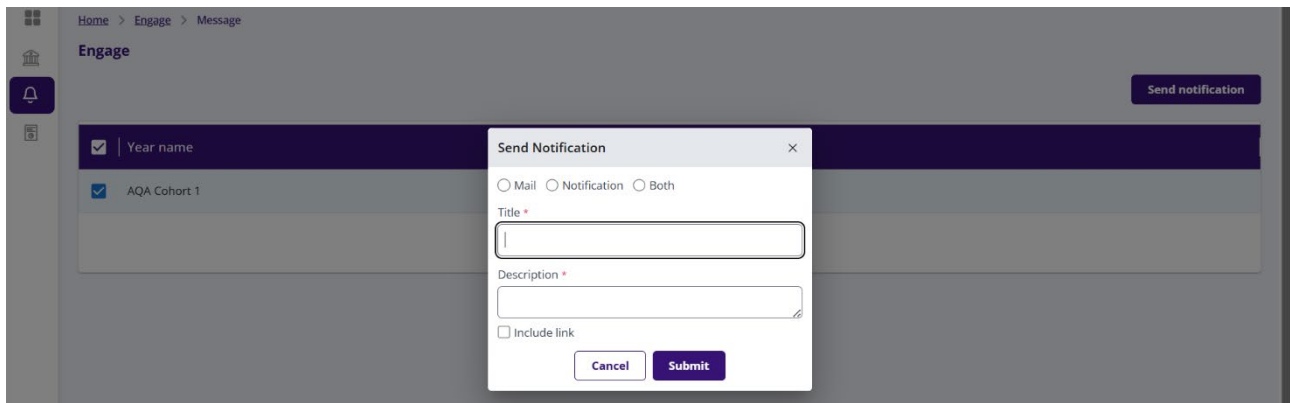
Step 4: Select Send Notification.

The screenshot shows the Engage Message form. The breadcrumb trail is 'Home > Engage > Message'. The page title is 'Engage'. There is a 'Send notification' button in the top right corner. The form has two main sections: 'Year name' and 'School Name'. Under 'Year name', there is a checkbox for 'AQA Cohort 1' which is checked. Under 'School Name', there is a dropdown menu showing 'AQA FF School 1'. At the bottom, there is a pagination control showing '< 1 >' and 'Show 10'.

Step 5: Choose Mail, Notification or Both.

Step 6: Enter a clear title and description. Add a link if required.

Step 7: Review the audience and content, then select Submit.

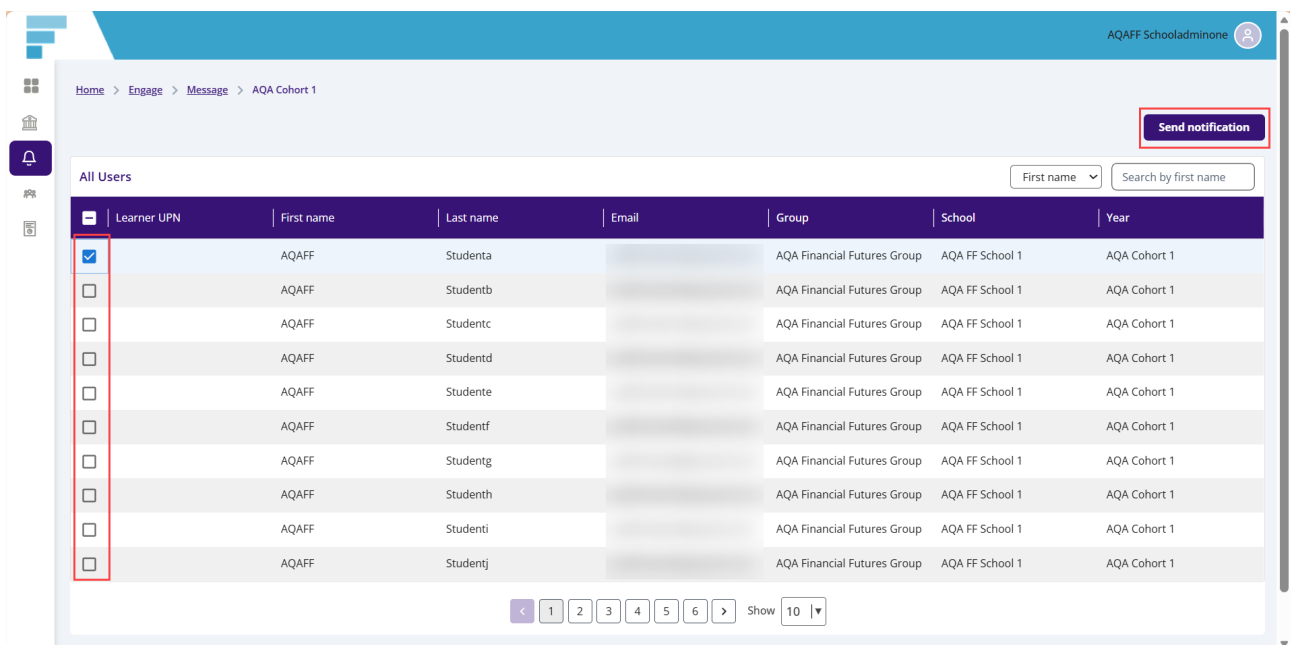


Send to selected users

Step 1: Open the required school or user list from Engage.

Step 2: Select the checkbox beside each intended recipient.

Step 3: Select Send Notification.



Step 4: Choose the delivery method, enter the message and select Submit.

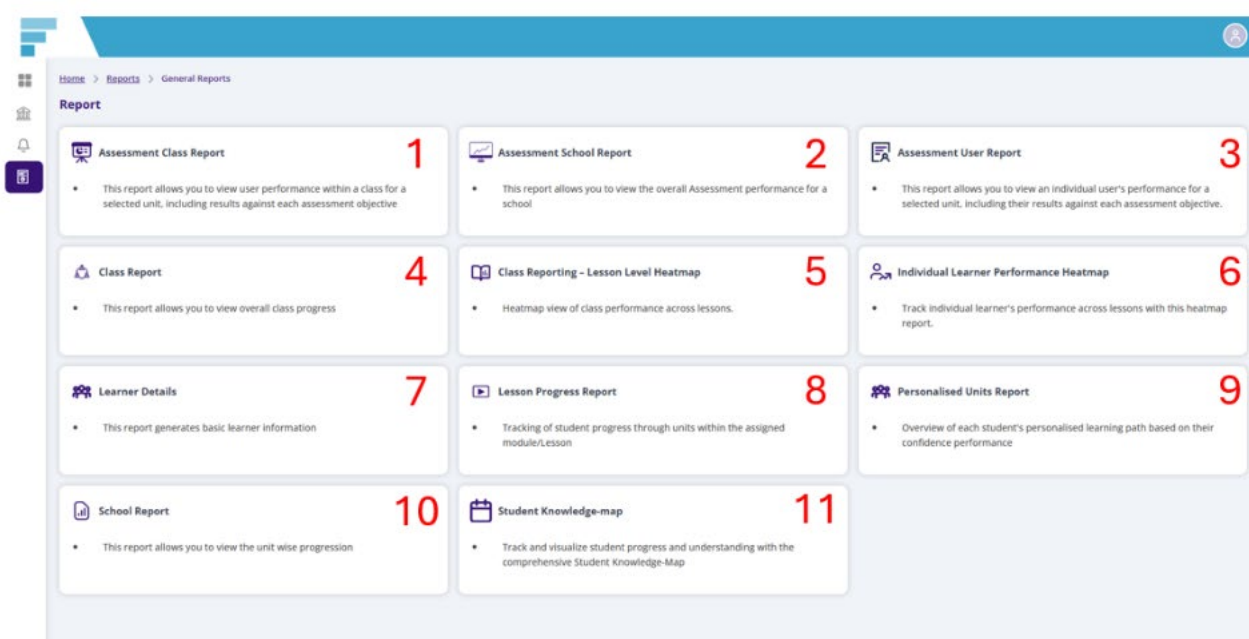
Good practice for messages:

- Check the recipient group before sending.
- Use a clear, specific title.
- Keep the message concise and include the action required.
- Do not include sensitive learner information in a general notification.
- Check links before selecting Submit.

Using reports

The Reports area can be selected from the left-hand menu. A range of reports are designed to help administrators and teachers monitor learner activity, track progress and evaluate assessment outcomes.

Reports can be filtered by year, class, learner, unit, module and lesson, depending on the report selected. Select a report to open it. Most reports can also be exported to Excel for further analysis.



Which report should I use?

When you want to know...	Useful report	Report Number
How learners performed against assessment objectives	Assessment Class Report or Assessment User Report	1 or 3
How learners at a school or college level are progressing overall	Assessment School Report	2
How a class is progressing overall	Class Report	4
How learners performed question by question in a lesson	Class Reporting - Lesson Level Heat Map	5
How one learner performed across lessons	Individual Learner Performance Heat Map	6
Learner identifiers and contact information	Learner Details Report	7

Which lessons learners have started or completed	Lesson Progress Report	8
Which personalised units have been assigned and completed	Personalised Units Report	9
A unit-level overview of participation, completion and assessment	School Report	10
Progress across courses and learning concepts	Learner Knowledge-Map	11

Generate and export a report

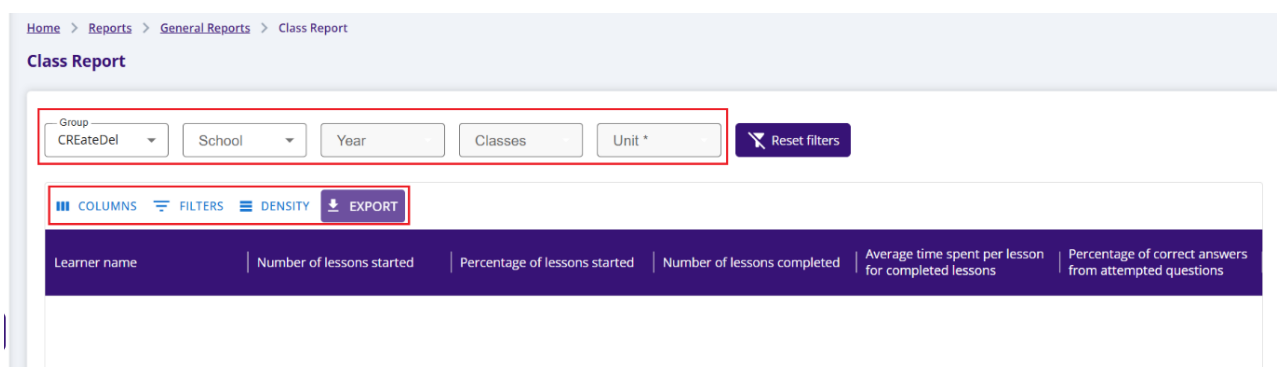
Step 1: Select the report.

Step 2: Apply the required filters, such as Year, Class, Unit, Learner or Lesson. Available choices may depend on earlier selections.

Step 3: Review the results. Use Columns, Filters and Density where available to adjust the view.

Step 4: Select Export to download the report in Excel format.

Start with the question you need to answer. Apply only the filters needed, then export if you need to share or analyse the information offline.



Good practice at the end of a session

- Complete or save any administration task in progress.
- Close report exports and store downloaded files in an approved secure location.
- Remove downloaded learner data when it is no longer needed, in line with centre processes.
- Select the profile icon and choose Sign out.
- Close the browser, particularly when using a shared device.

Account and data security

- Do not share passwords, verification codes or MFA details.
- Use your own administrator account so activity is attributable to the correct user.
- Check that learner information is accurate before creating or updating records.
- Confirm the intended audience before sending notifications.
- Only export and share the minimum learner information needed for the task.

User role and permissions

Permission	Teacher (assigned years)	School Admin (assigned school)	Group Admin (assigned group)
See dashboards	✓	✓	✓
Request assessments	✓	✓	✓
Create, edit and delete (if empty) classes	✓	✓	✓
Add, edit and delete learner accounts	✗	✓	✓
Add, edit and delete teacher accounts	✗	✓	✓
Add, edit and delete school admin accounts	✗	✗	✓
Move learner between years	✗	✓	✓ (including between schools)
Move learners between schools	✗	✗	✓
Assign learners to classes	✓	✓	✓
Send notifications	✓	✓	✓
View reporting	✓	✓	✓

Troubleshooting and support

Issue	What to do
I have not received my account email	Check the junk or spam folder. If the email is still missing, contact AQAFinancialFutures@aqa.org.uk
My one-time password does not work	Check that the username and password have been entered exactly as supplied. If the issue continues, request support from contact AQAFinancialFutures@aqa.org.uk .
I cannot complete MFA setup	Check that the authenticator app is installed and the current verification code has been entered. MFA can be configured on one mobile device at a time.
I have forgotten my password	Select Forgot password? and follow the reset instructions. Check the junk or spam folder for the reset email.
I cannot see the expected year, learner or class	Check the selected group, school and year. Use Reset Filters where available. If the item is still missing, check permissions or contact AQAFinancialFutures@aqa.org.uk
A year or class will not delete	Remove associated learners or classes first, then try again. Avoid deleting learners where possible. Request support from contact AQAFinancialFutures@aqa.org.uk
A report is blank	Check the selected filters and whether relevant learner activity exists. Reset the filters and apply them again if needed.
I need more help	Please contact AQAFinancialFutures@aqa.org.uk if you require support or have queries that are not covered in this guide.