



**HEPservices**  
SLC partnering with colleges & universities



**Student**  
Loans Company

# HE Gateway

User guide for colleges and universities

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## Section 1 | Definitions & Related Documents

### Definitions

Term	Definition
FIS	Financial Information Service
HEI / HEP	Higher Education Institution / Provider
HE Gateway	Portal access for each HEI/HEP
SIS	Student Information Service
SLC	Student Loans Company

### Related Documents

Document	Location
Bursaries Service User Guide	Available on the Bursaries Service Home page within the HE Portal <a href="http://www.heiinfo.slc.co.uk/media/833748/course_s_user_guide.pdf">http://www.heiinfo.slc.co.uk/media/833748/course_s_user_guide.pdf</a>
Courses User Guide	<a href="http://www.heiinfo.slc.co.uk/media/833795/fis_-_he_provider_version.pdf">http://www.heiinfo.slc.co.uk/media/833795/fis_-_he_provider_version.pdf</a>
Financial Information Service (FIS) User Guide	<a href="http://www.heiinfo.slc.co.uk/media/833807/sis_user_guide.pdf">http://www.heiinfo.slc.co.uk/media/833807/sis_user_guide.pdf</a>
Student Information Service (SIS) User Guide	<a href="http://www.heiinfo.slc.co.uk/media/832257/joiners_pack_2014.pdf">http://www.heiinfo.slc.co.uk/media/832257/joiners_pack_2014.pdf</a>
HEP Joining Pack	

## Section 2 | Purpose of the HE Gateway Portal User Guide

The purpose of the *HE Gateway User Guide* is to introduce staff of Higher Education Providers (HEPs) to the HE Gateway Home page within the HE Services Portal.

It outlines basic processes and procedures to follow when using the HE Gateway Home page, the functions available to you, help resources and general best practice rules.

It assumes that users are familiar with the browser application Microsoft Internet Explorer.

### What is the HE Gateway?

The Student Loans Company (SLC) provides administration services to HEPs in support of student funding. The HE Gateway is a secure website that has been developed to facilitate online services.

If, after reading this document, you require further assistance, please contact the Operations Services Helpdesk on **0300 100 0642**.

## Section 3 | How to access the HE Gateway

### Logging In

The HE Gateway is accessed through a web browser, such as Microsoft Internet Explorer. You access the HE Gateway through the HEP Services website via the following link: <http://www.heinfo.slc.co.uk>.

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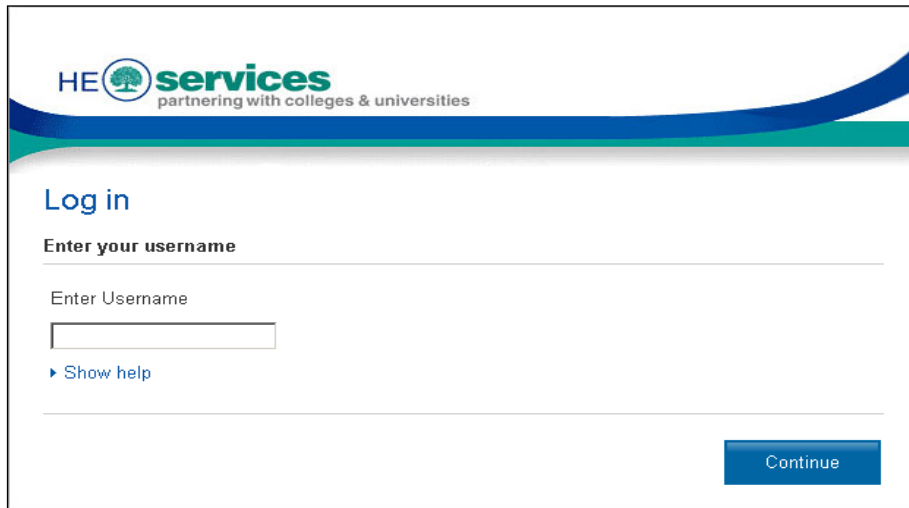
**Add this address to your Favourites in Internet Explorer so that you can find it again easily. Select Favourites / Add to Favourites.**

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Note

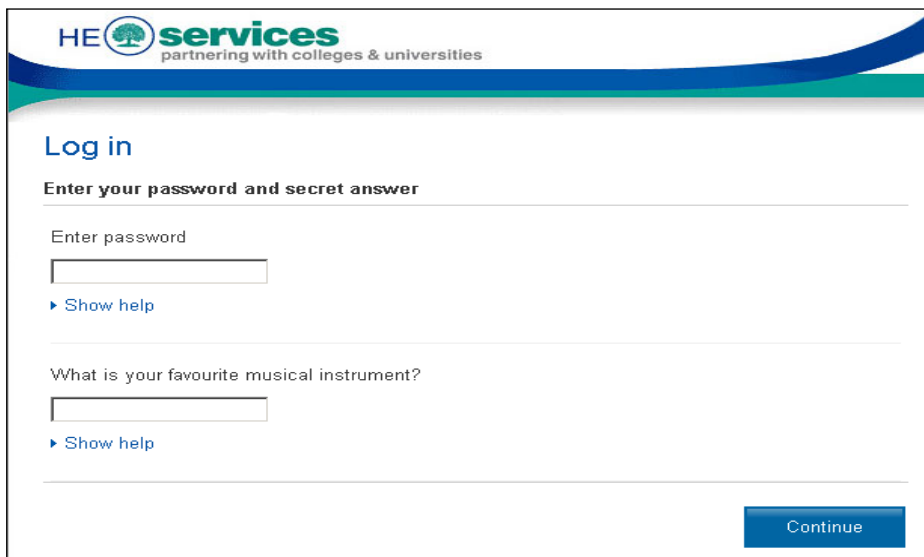
Your login, initial password and secret answer will be provided to you by the **User Administrator** within your institution. To log in:

- 1) Select the HE Services Portal link from the web page. The **Login** screen displays.



The screenshot shows the HE Services Portal login page. At the top, the logo reads "HE services partnering with colleges & universities". Below the logo, the heading "Log in" is displayed. Underneath, the instruction "Enter your username" is followed by a text input field labeled "Enter Username". A "Show help" link is positioned below the input field. A blue "Continue" button is located at the bottom right of the form.

- 2) At **Enter Username**, enter your username and select the Continue button.



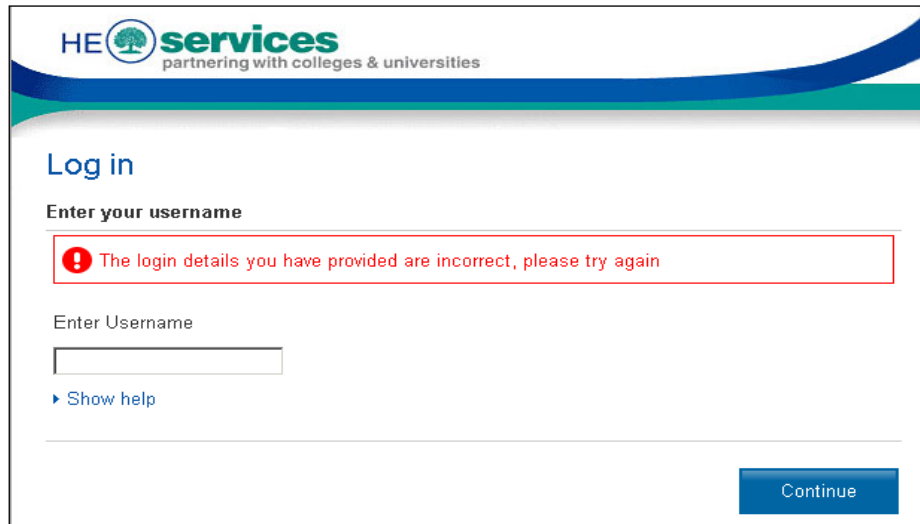
The screenshot shows the HE Services Portal login page after the username step. The heading "Log in" is still present. Below it, the instruction "Enter your password and secret answer" is followed by a text input field labeled "Enter password". A "Show help" link is positioned below the input field. Below this, the instruction "What is your favourite musical instrument?" is followed by another text input field. A second "Show help" link is positioned below this input field. A blue "Continue" button is located at the bottom right of the form.

- 3) Enter your password and the answer to your secret question. Your responses display as asterisks. Please note that both your password and answer are case sensitive.

- 4) Select the **Continue** button, you will now be logged into the HE Gateway.

## Incorrect login

If you enter your username, password or the answer to the question incorrectly, you will be prompted to re-enter your login details.



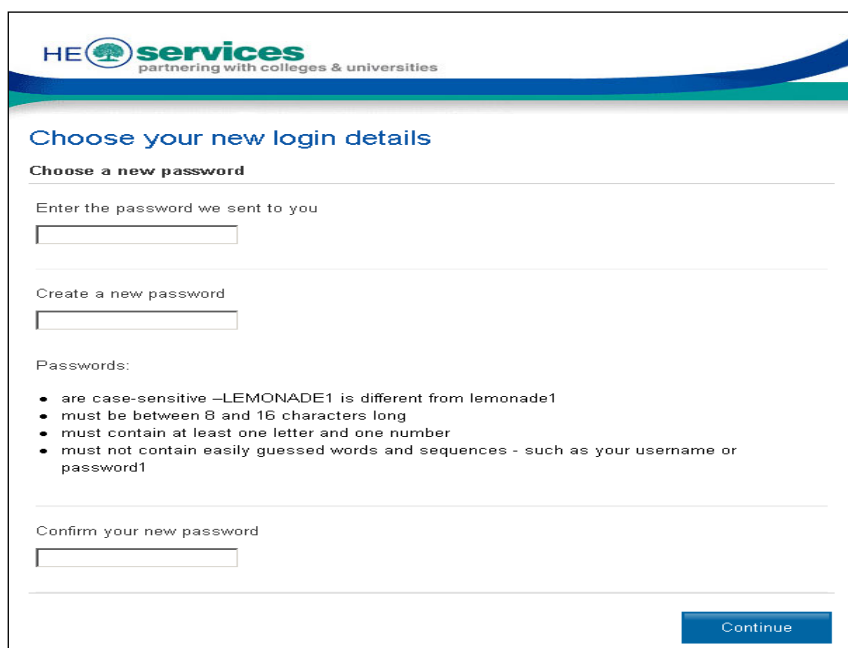
The screenshot shows the HE services login page. At the top, the logo reads "HE services" with the tagline "partnering with colleges & universities". Below the logo is the heading "Log in". Underneath, it says "Enter your username". A red-bordered box contains an error message: "The login details you have provided are incorrect, please try again". Below this, there is a text input field labeled "Enter Username" and a "Show help" link. At the bottom right, there is a blue "Continue" button.

After three unsuccessful attempts you will be locked out of the system. To unlock your account contact your User Administrator for assistance.

## First time login

To ensure your security, when you first log in to the system you will be required to select a new password, secret question and answer.

- 1) After you have entered your username and selected the **Continue** button, the following screen will appear.



The screenshot shows the "Choose your new login details" page. At the top, the logo reads "HE services" with the tagline "partnering with colleges & universities". Below the logo is the heading "Choose your new login details". Underneath, it says "Choose a new password". There are two text input fields: "Enter the password we sent to you" and "Create a new password". Below these fields, there is a list of password requirements:

- are case-sensitive –LEMONADE1 is different from lemonade1
- must be between 8 and 16 characters long
- must contain at least one letter and one number
- must not contain easily guessed words and sequences - such as your username or password1

Below the list, there is a text input field labeled "Confirm your new password". At the bottom right, there is a blue "Continue" button.

- 2) Enter the password given to you by your User Administrator.

---

Passwords are case-sensitive, must be between 8 and 16 characters in length and must contain at least one alphanumeric character. They are also blocked from containing easily guessed words and sequences such as your username or password1.

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Note

- 3) Enter your new proposed password and confirm it. The following screen will appear:

HE Gateway services  
partnering with colleges & universities

### Choose your new login details

Choose a new secret question and answer

Enter the secret answer we sent you

**\* Choose a new secret question**

What was the surname of your childhood hero?

What was the name of the place you first met your partner?

What was the surname of your favourite teacher?

What is your most memorable place, but not where you were born or live?

What is the surname of a memorable person who isn't a relation or partner?

What is your favourite musical instrument?

Create your new secret answer

Secret answers:

- are case-sensitive - LEMONADE1 is different from lemonade1
- must contain at least 4 characters and can be a maximum of 16 characters long
- can contain either letters or numbers
- can only contain characters from either A - Z or between 0 - 9

Secret answers should be something only you will know and difficult for others to guess. They should not be related to your password in any way. Choose something you will remember.

Confirm your new secret answer

- 4) Enter the secret answer given to you by your User Administrator. Then, select a new secret question by checking the relevant radio button.
- 5) Enter and confirm your new secret answer.
- 6) Select the **Continue** button to complete your initial login.

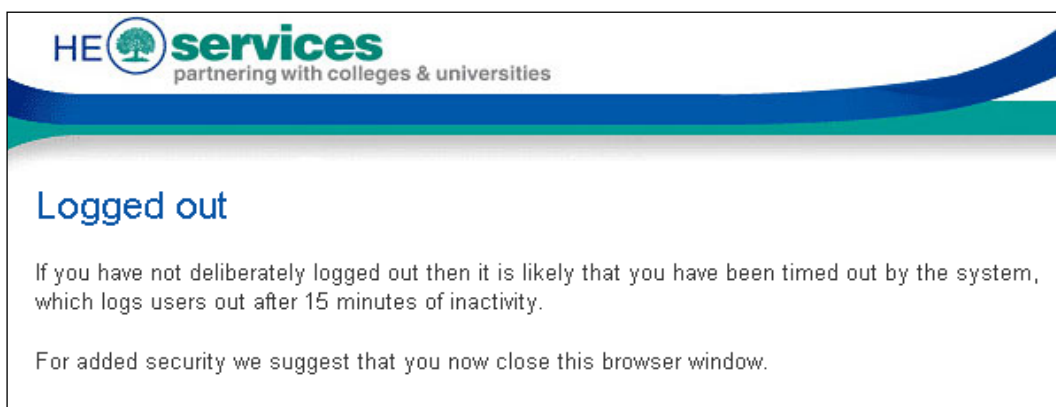
## Logging Out

You should always log out of the system when you are finished to prevent unauthorised use of your login ID.

To log out, select **Logout** on the top-right of the screen. The **Logging Out** screen displays while the system completes the process. Do not close your browser at this point.



A confirmation message is displayed when the log out is complete.



For security purposes, you should now close your browser. Please note that after 15 minutes of inactivity, the system will log you out automatically.

## Security

HEPs are required to be vigilant about logins and passwords. If someone leaves an HEP, it is essential that the User Administrator expires their login on the system, to ensure the security of the HE Gateway. To find out more about expiring logins, please see Expiring User Accounts on page [23](#).

## Technical Specifications

To use the HE Gateway at an optimum level, the minimum required technical specifications are:

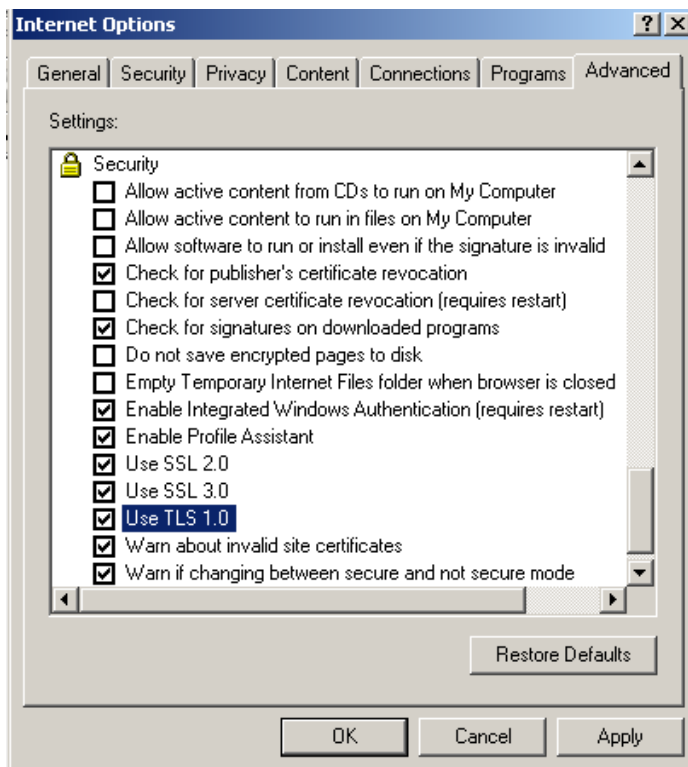
- 100Mbps network connection
- Pentium 4 PC with a 60Gb hard drive and at least 256Mb memory
- Windows 2000/XP with Internet Explorer version 6
- 1025 x 768 screen resolution



## Internet Explorer 6

An update applied to the website to keep it safe and secure means that users may experience difficulties accessing some parts of the website using Internet Explorer 6. Should Users experience such problems then the following workaround can be applied to alleviate the issue:

1. Internet Explorer 6, go to **Tools > Internet Options**
2. Select the **Advanced** Tab
3. Scroll Down to the **Security** Section
4. Select the checkbox **Use TLS 1.0**:



5. Select the **Apply** button
6. Select the **OK** button

## Section 4 | System Roles

Users of each Service have 'roles' associated with their logins. These roles determine their level of access to the system: the options they see on screen and the actions they can perform. Staff can be assigned more than one role by their User Administrator.

### Bursaries Service User Roles

<b>HEI User</b>	This role <b>must</b> be assigned to all HEP users. It enables basic functionality, such as viewing pages correctly.
<b>HES User Administrator</b>	HEP users who will facilitate user maintenance functions within their own HEI User Base. This includes setting up new users, allocating roles and administration such as resetting passwords. It is important that you have more than one user with this role, to cover holidays etc.
<b>HEI Bursaries Administrator</b>	HEP users who will be able to maintain/view the Institution Profile and Award information, including setting up new Payment Profiles and creating and activating Awards.
<b>HEI Bursaries Approver</b>	HEP users with full access to Student List functions, who can approve award sets and cancel, reinstate and override payments. You may require more than one Approver because if an Approver is the last person to amend a students' entitlements, they cannot approve these entitlements. Alternatively, if you only have one Approver, then an Assessor must make these types of amendments.
<b>HEI Bursaries Assessor</b>	HEP users with full access to Student List functions, who can cancel, reinstate and override payments. They cannot approve award sets.
<b>HEI Bursaries Advisor</b>	HEP users with full access to some Student List functions and read-only access to others.

### Courses Service User Roles

<b>HEI User</b>	This role <b>must</b> be assigned to all HEP users. It enables basic functionality, such as viewing pages correctly
<b>HEI Course Advisor</b>	HEP users who can access course information to deal with general enquiries, on a read only basis.
<b>HEI Course Administrator</b>	HEP users who will be able to view and maintain the Institution profile and course information.
<b>HES Courses User Administrator</b>	HEP users who will facilitate user maintenance functions within their own HEI User Base. This includes setting up new users, allocating roles and administration such as resetting passwords.
<b>HEI Course Web Service User</b>	HEP users who will be able to view and maintain the Institution profile and course information via the web service.

## Financial Information Service (FIS) User Roles

<b>HEI User</b>	This role <b>must</b> be assigned to all HEP users. It enables basic functionality, such as viewing pages correctly.
<b>HEI Financial Information Service Advisor</b>	HEP users who can access the Supplementary Financial Information screen to deal with general enquiries, on a read only basis.
<b>HEI Financial Information Service Administrator</b>	HEP users who will be able to view and maintain the Supplementary Financial Information.
<b>HES Financials User Administrator</b>	HEP users who will facilitate user maintenance functions within their own HEI User Base. This includes setting up new users, allocating roles and administration such as resetting passwords.

## Student Information Service

<b>HEI User</b>	This role <b>must</b> be assigned to all HEP users. It enables basic functionality, such as viewing pages correctly.
<b>HEI Attendance Administrator</b>	HEP users who will be able to view and maintain the Attendance Worklist.
<b>HEI CoC Administrator</b>	HEP users who will be able to view and maintain the CoC Worklist.
<b>HEI CoC Advisor</b>	HEP users who can access the List of CoC's screen to deal with general enquiries, on a read only basis.
<b>HEI SIS Report Advisor</b>	HEP users who can access the SIS Reports to deal with general enquiries, on a read only basis.
<b>HEI Student Information Advisor</b>	HEP users who can access the view Student Information Screen to deal with general enquiries, on a read only basis.
<b>HES SIS User Administrator</b>	HEP users who will facilitate user maintenance functions within their own HEI User Base. This includes setting up new users, allocating roles and resetting passwords.
<b>HEI Registration Administrator</b>	HEP users who will be able to view and maintain the Registration Worklist.
<b>HEI Combined Administrator</b>	HEP users who will be able to view and maintain the Combined Worklist.

## Which System roles does my HEP need?

To operate each service, your HEP must contain at least one of each HEI role. Each person can be allocated more than one role, and each person **must** be assigned the role **HEI User**.

## System role Keys

Throughout this user guide you will see keys indicating which system roles can access different parts of the HE Gateway.



**Full access**  
User Administrator

If you see the above key at the beginning of a section, this means that the **User Administrator** has full access to functionality within that section.

Sections outlining functionality for all users, or general information, are identified with the following key:



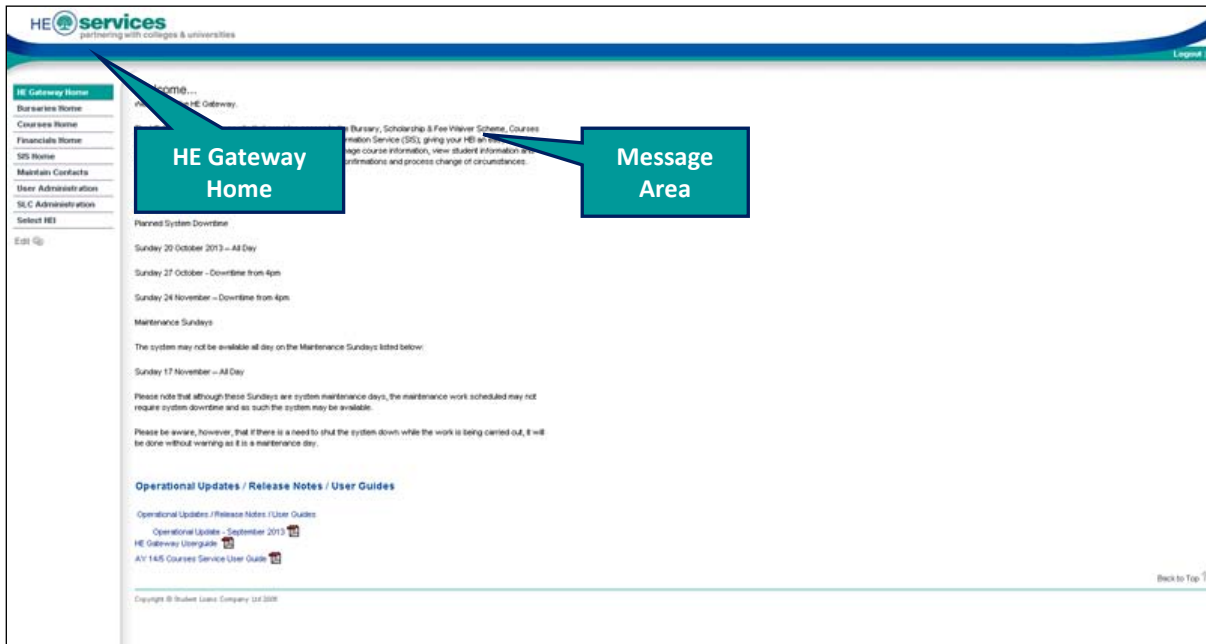
**All roles**

## Section 5 | Using the HE Portal



### The HE Gateway Home page


The HE Gateway Home page provides you with links to the current service options.



The options you can see will depend on your role in the system. See System Roles on page 9 for more information. The service options display in the panel on the left, and include:



<b>Bursaries Home</b>	Accesses the Bursaries Service Home page. To learn more about how to operate the Bursaries Service, please see the user guide on this screen. See Related Documents on page 3 for the link to the website.
<b>Courses Home</b>	Accesses the Courses Service Home page. To learn more about how to operate the Courses Service, please see the user guide on this screen. See Related Documents on page 3 for the link to the website.
<b>Financials Home</b>	Accesses the FIS Service Home page. To learn more about how to operate the FIS Service, please see the user guide on this screen. See Related Documents on page 3 for the link to the website.
<b>SIS Home</b>	Accesses the SIS Home page. To learn more about how to operate the SIS Service, please see the user guide on this screen. See Related Documents on page 3 for the link to the website.
<b>Maintain Contacts</b>	This option is used to view and update the list of contacts for HEPs. See Maintaining HEI Contacts on page 16.
<b>User Administration</b>	This section allows User Administrators to administer different users. See Administering System Users on page 18.
<b>Select HEI</b>	Use this option to select an HEP to administer, if you have access to more than one HEI. See Selecting an HEI on page 15.

News and other information items appear in the message area in the centre of the screen.

The [Back to Top](#)  link at the bottom right of the screen returns you quickly to the top of the screen without having to scroll.

A [Logout](#) link at the top right of the screen allows you to log out from anywhere in the system.

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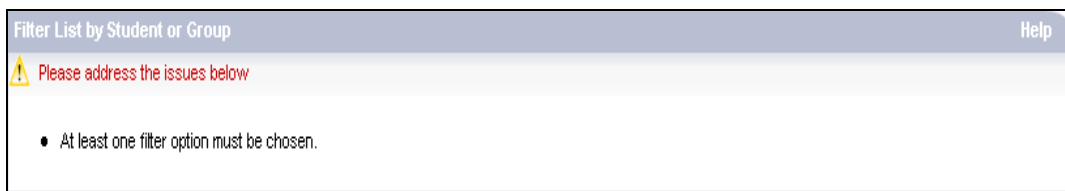
**The HE Gateway is an application rather than simple web pages, do not use the browser's back and forward buttons  Back  to move through the screens. You are likely to get unexpected results. Use system navigation only (on-screen buttons and menus).**

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Note

## Error Messages

The system will display error messages at the top of the screen. For example, the system may have detected a validation issue, such as a mandatory field that has not been entered, or incorrectly formatted data, as shown below:





In these cases, you can correct the error and continue.

If there is a problem with the system, the error message will be more technical, for example:



Contact the Operations Services Helpdesk for assistance (see Operations Services Helpdesk on page 14).

## Getting Help

The system includes an online help facility. Click on [Help](#)  to open help for the current screen in a separate browser window. Use the scroll bar to move through the help text. You can resize the window if you wish. Click on  to close help.

## Telephone or Email Assistance

### Operations Services Helpdesk (for HEPs)

If you have problems operating the HE Gateway, please call the Operations Services Helpdesk on **0300 100 0642** or email one of the following mailboxes accordingly. To speak to one of the helpdesk team you must be set up as a contact on the HE Gateway for your HEP (see Maintaining HEI contacts page **16**):

Bursaries Service – [bursary@slc.co.uk](mailto:bursary@slc.co.uk)

Courses Service – [hep\\_services@slc.co.uk](mailto:hep_services@slc.co.uk)

Financial Information Service (FIS) – [fis@slc.co.uk](mailto:fis@slc.co.uk)

Student Information Service (SIS) – [sis@slc.co.uk](mailto:sis@slc.co.uk)

The Helpdesk is available from 9am – 5.30pm, Monday to Friday.

### Bursaries Service Helpline (for Students)

An Interactive Voice Response (IVR) service is available to provide students with information on award payment dates and amounts, on **0300 100 0612**. If students require further assistance, they can request to be transferred to a customer advisor. The line is available from 8am to 8pm Monday to Friday, 9.30am – 5pm Saturday and Sunday and closed on bank holidays.

## Section 6 | Selecting an HEI

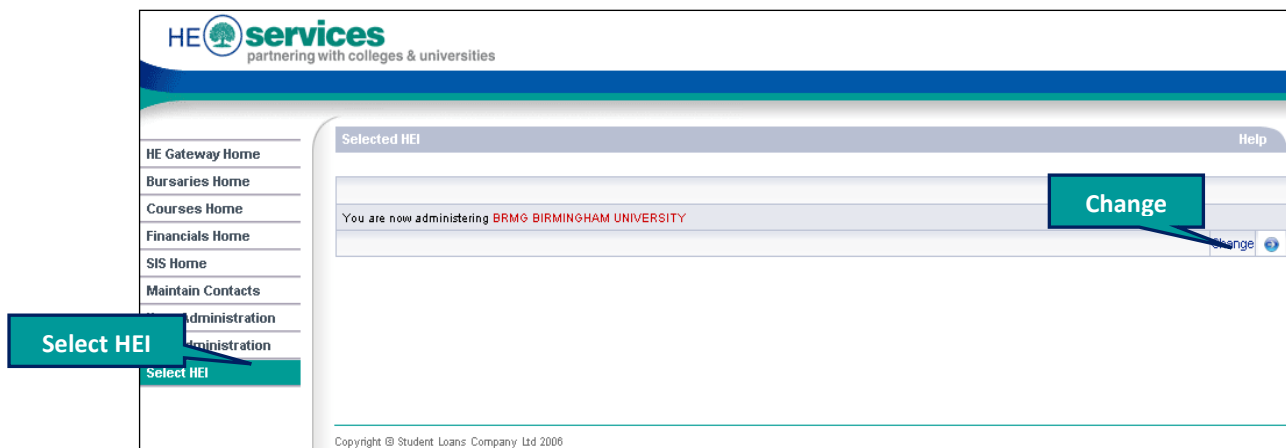


If you only have access to one HEP, it will automatically be selected when you login to the HE Gateway. If you click on the Select HEI menu item, it will display the message ***"Your HEI has been determined. You are not permitted to choose another HEI"***.

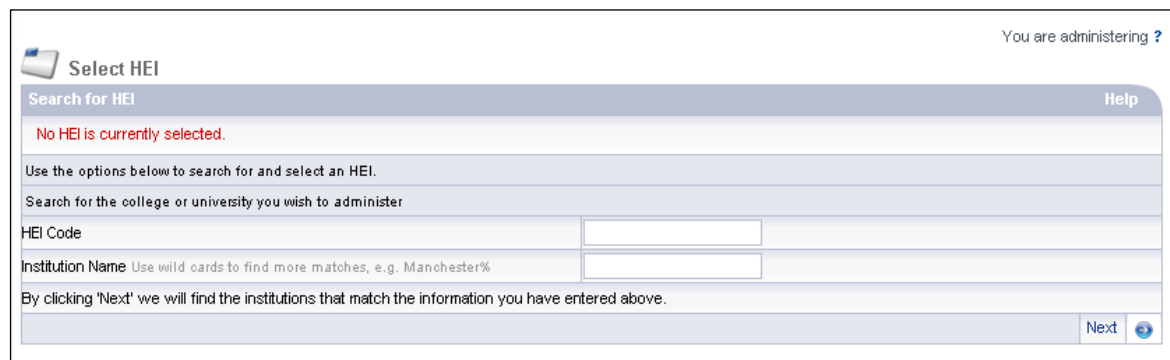
If you have access to more than one HEI (HEP), you must select which HEI you want to administer before using the HE Gateway. You can only administer one HEP at a time. To do this:

- 1) Click on **Select HEI** from the HE Gateway Home pages. The Selected HEI screen displays.

If you have already been working on an HEI, the system displays the name of the HEI.



- 2) Select **Change**.



- 3) Enter your search using the **HEI Code** or **Institution Name**. You can use the wildcard '%' when searching for an Institution Name, though you must also use a minimum of three letters. You may use two wildcards - for example, %York% will pick up those institutions (that you have access to) that contain York, whereas York% will pick up those that start with York. If you are using the HEI code, you cannot use wildcards - the code must be an exact match.

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**You cannot submit a blank search – you must enter either an HEI code or an institution name. Similarly, you cannot use the wildcard alone – you must also enter a character combination.**

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Note

- 4) Select **Next**. The institutions matching your search display in **Search Results**. If there is only one institution matching your search it will automatically display.
- 5) Click on the entry in **HEI Name** column to select the institution. If the institution is not listed, select **Back** to return to the **Select HEI** screen and search again.



## Section 7 | Maintaining HEI Contacts

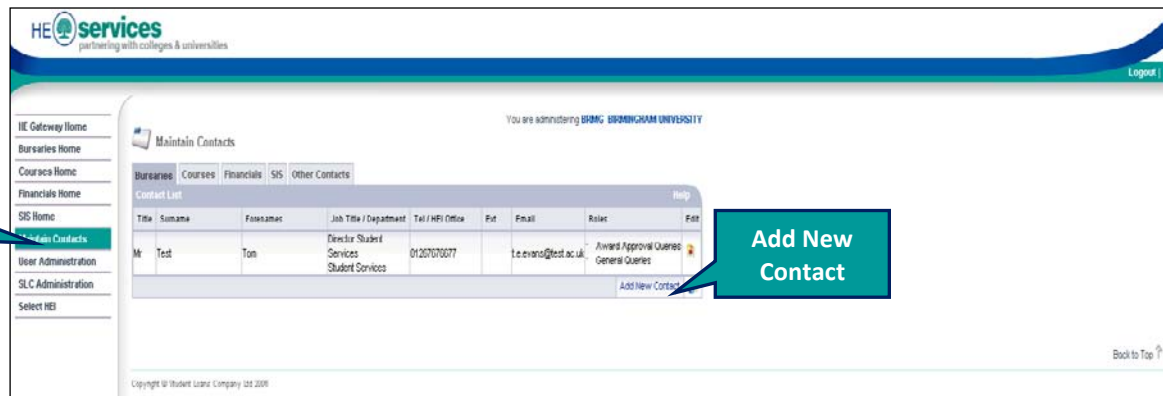


The system holds a list of contacts within HEIs (HEPs) that use each service. Each contact is assigned one or more contact roles. If SLC need to get in touch with an HEI (HEP) to deal with an issue or resolve a query, they can use this list to identify the most appropriate person. It may also be helpful within HEIs (HEPs) to identify contacts.

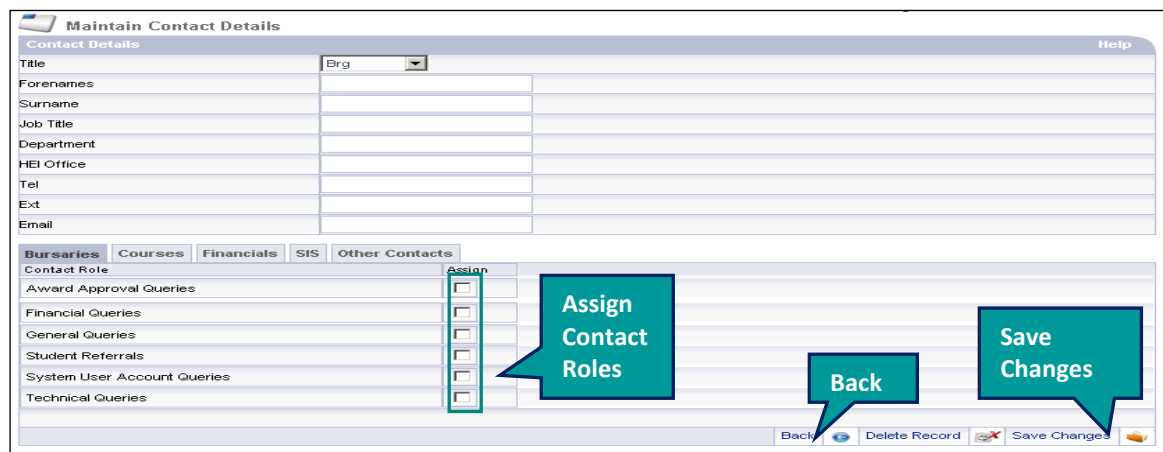
Please ensure your HEI keeps its contacts updated, as not doing so could lead to delays in processing payments. When you make changes, please send a copy of the changes to the appropriate service email (which are detailed on page 14), so that SLC can update their internal database as well.

### Adding Contacts

- 1) To add a new contact, select Maintain Contacts from the HE Gateway Home page. The **Maintain Contacts** screen displays the Contact List.



- 2) Select **Add New Contact**. A blank Contact Details record is displayed.



- 3) Complete the details. **Title**, **Forename**, **Surname**, **Job Title**, **Department** and **Tel / Email** are mandatory fields.
- 4) Click in the **Assign** check box to select the roles required, or click again to de-select the role. There is no restriction on the number of roles that can be assigned.
- 5) Select **Save Changes**.
- 6) Select **Back** to return to the Contacts List.

## Editing Contacts

To edit contact information, select Maintain Contacts from the HE Gateway Home page.

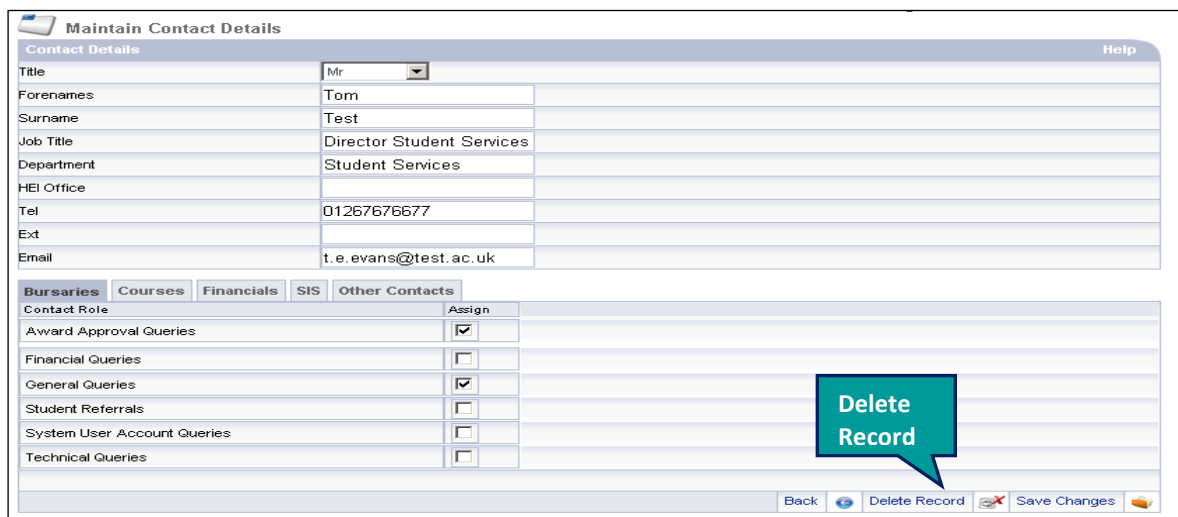
The screen displays the details of each contact ordered by surname, along with their department and office. You can edit these details as required directly from this screen by selecting the edit icon:



When you have finished editing, select **Save Changes**.

## Deleting Contacts

- 1) To delete a contact, select Maintain Contacts from the HE Gateway Home page
- 2) Select the Edit icon next to the contact you are deleting
- 3) Select **Delete Record** and Save changes



The screenshot shows the 'Maintain Contact Details' form. The top section is titled 'Contact Details' and includes fields for Title (Mr), Forenames (Tom), Surname (Test), Job Title (Director Student Services), Department (Student Services), HEI Office, Tel (01267676677), Ext, and Email (t.e.evans@test.ac.uk). Below this is a section for 'Contact Role' with a table of roles and checkboxes. A blue callout box labeled 'Delete Record' points to the 'Delete Record' button in the bottom right corner of the form.

Contact Role	Assign
Award Approval Queries	<input checked="" type="checkbox"/>
Financial Queries	<input type="checkbox"/>
General Queries	<input checked="" type="checkbox"/>
Student Referrals	<input type="checkbox"/>
System User Account Queries	<input type="checkbox"/>
Technical Queries	<input type="checkbox"/>

Buttons at the bottom: Back, Delete Record, Save Changes

## Section 8 | Administering System Users



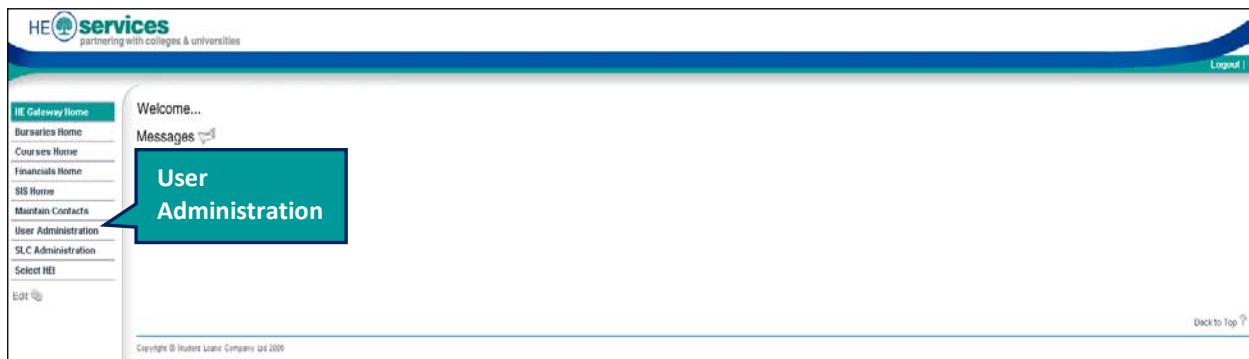
Full access  
User Administrator

The HE Gateway includes a facility to create and maintain user accounts. Accounts are created using a defined structure of a User Base, then User Groups and User Roles. The User Administrator(s) within your HEP are responsible for creating and administering system users for your HEP.

<b>User Base</b>	<p>A user base is a collection of users. For HEPs, the different service user bases within the Gateway are:</p> <p><b>HEIs - Bursaries, HEIs - Courses, HEIs – Financials, HEIs - SIS</b></p>
<b>User Group</b>	<p>A user group is an organisational group with which a user is associated. The user group determines which customer records a user can process.</p> <p>For HEP users, this will be the name of their HEP (and any associated HEPs where applicable).</p>
<b>User Role</b>	<p>A user role is the level of access a user has within a system. A user can be assigned a number of roles, depending on the level of access and responsibility they are to have. See System Roles on page 9.</p>

### Using the User Administration function

To begin administering users, select **User Administration** from the HE Gateway Home page.



If you have access to more than one **User Group**, the User Group page will appear. From this page, you can select a User Group to show the **User List**.

If you have access to a single User Group, or if you have chosen a User Group as per the paragraph above, the **Users List** will appear.

Users List					Help
<b>User Base</b>	Service Group	HEI Services			
	User Base	SLC HEI Business Services			
<b>User Group</b>	User Group	SLC HEI Business Development			
	Edit / View	Username	Surname	Forename(s)	Expired
<b>User List</b>	Edit / View	BAIRDJF1	BAIRD	JAMES	<input type="checkbox"/>
	Edit / View	BURSARU1	BURSARIES	USER1	<input type="checkbox"/>

The Users List displays a list of users within the User Group. From this page you can create new users and administer existing users.

## Creating new users

- 1) Select User Administration from the HE Gateway Home page, and choose **Create New User**, located on the bottom-right of the screen, from the page that displays. The **Profile for New User** page will display.

- 2) Enter the new user's details: **Forename(s)**, **Surname**, **Contact No** and **Email address**. These are all mandatory fields.
- 3) Select **Authorisation and Authentication**. The **Group Memberships** screen will display.

- 4) Select a **Group** that you wish to assign to the user from the drop down box.
- 5) Select **Add Group**.
- 6) If there is more than one group available, you may repeat steps 4 and 5 until you have added all the groups you wish to assign to the new user.
- 7) Select **Continue**. The **Role Memberships** screen will display.

- 8) Select a **Role** that you wish to assign to the user from the drop down box. See System Roles on page 9 for more information on Roles.
- 9) Select **Add Role**.

---

**You must assign the role HEI User to all users.**

---

Note

10) Repeat steps 8 and 9 until you have added all the roles you wish to assign.

11) Select Continue. The **Credentials for New User** screen will display.

Credentials for New User			Help
Method	Set/Re-set	Lock	
Single Sign On	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
			Back Continue

12) Select **Continue** (this screen is to set and re-set login details, which is not necessary when creating a new user).

13) The **Confirm Details** screen displays, showing user details including memberships and login details. *You must take a screenshot of this page, or print it, so that you can advise the user of their new login details. This information will not be provided to you in any other way.*

Confirm Details for TAYLORLN		Help
Service Group	N/A	
User Base	HEIs	
User	TAYLORLN	
Forename	LYNLEY	
Surname	TAYLOR	
Contact Number	0131 5555 5555	
Email	lynley@hei.co.uk	
Expired	<input type="checkbox"/>	
Group Memberships		Help
ASKHAM BRYAN COLLEGE	Start Date: 15/Jun/2006	End Date:
Role Memberships		Help
HEI User	Start Date: 15/Jun/2006	End Date:
Authentication Methods		Help
Single Sign On	Set/Re-set: <input checked="" type="checkbox"/>	Lock: <input type="checkbox"/>
Authentication Details		Help
Password	FXCSEU67	
Secret Answer	TERSXM57	
		Back Submit

14) Select **Submit**. The new user has now been created. You will now be returned to the User Administration screen.

## Administering existing users

You can amend a user's profile (name and contact details), expire a user's account, amend a user's user roles and groups and reset, cancel or activate login details.

From the **Users List** screen, scroll through and select the person that you wish to administer by clicking their Username.

---

**If you only have access to a single User Group, the Users List will appear when you click User Administration from the HE Gateway Home page. If you have access to more than one User Group, you must select the User Group to display the corresponding Users List.**

---

Note

Their **Profile** screen for this user will display.

Profile for RUSKINA1		Help
Forename(s)	<input type="text" value="Test"/>	
Surname	<input type="text" value="Test"/>	
Contact No	<input type="text" value="01413062000"/>	
Email address	<input type="text" value="heiusen@slc.co.uk"/>	
Expired	<input type="checkbox"/>	
		<a href="#">Back</a> <a href="#">Expire Account</a> <a href="#">Authorisation and Authentication</a> <a href="#">Reset Password</a>



### Amending user name and contact details

From this screen, you can now amend the user's forename, surname, contact phone number and email address by changing the fields in the screen. Please note that amending the names will not result in a regenerated username for that user.

---

**If the Expired checkbox is ticked, you cannot amend any user details.**

---

Note

### Amending roles and login details

Use this function to amend a user's user roles and groups and reset, cancel or activate login details.

- 1) From the Profile screen, select **Authorisation and Authentication**. The **Group Memberships** screen for this user will display.

Group Memberships for: TAYLORLN			Help
Group	Start Date/Time	End Date/Time	
ASKHAM BRYAN COLLEGE	15/Jun/2006	Expire	
ASKHAM BRYAN COLLEGE ▼	15/Jun/2006	Add Group	
			<a href="#">Back</a> <a href="#">Continue</a>

- 2) If you want to amend group membership, select the **Group** that you wish to add or delete for the user from the drop down box.
- 3) Select **Add Group** to add, or **Expire** to delete.
- 4) Repeat steps 2 and 3 until you have added or deleted all the groups you wish to amend for the user.
- 5) Select **Continue**. The **Role Memberships** screen for this user will display.

Role Memberships for TAYLORLN			Help
Role	Start Date/Time	End Date/Time	
HEI User	15/Jun/2006	Expire	
HEI HEBSS Advisor ▼	15/Jun/2006	Add Role	
			<a href="#">Back</a> <a href="#">Continue</a>

- 6) If you want to amend roles for the user, select a **Role** that you wish to add or delete for this user from the drop down box. See System Roles on page 9 for more information on roles.
- 7) Select **Add Role** to add, or **Expire** to expire this user's access. Repeat steps 6 and 7 until you have added or deleted all the roles you wish to amend.
- 8) Select **Continue**. The **Credentials** screen for this user displays.

Credentials for TAYLORLN			Help
Method	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Continue

- 9) If you wish to reset login details, tick the **Set/Re-set** box. If the user has locked their account, by entering their username, password or secret answer incorrectly three times, the **Lock** box will be checked.
- 10) Select **Continue**. The Confirm Details screen will display, showing user details such as memberships and login information. **You must take a screenshot of this page, or print it, so that you can advise the user of their new login details.**

Confirm Details for TAYLORLN			Help
Service Group	N/A		
User Base	HEIs		
User	TAYLORLN		
Forename	LYNLEY		
Surname	TAYLOR		
Contact Number	0131 5555 5555		
Email	lynley@hei.co.uk		
Expired	<input type="checkbox"/>		
Group Memberships			Help
	Start Date	End Date	
ASKHAM BRYAN COLLEGE	15/Jun/2006		
Role Memberships			Help
	Start Date	End Date	
HEI HEBSS Advisor	15/Jun/2006		
HEI User	15/Jun/2006		
Authentication Methods			Help
	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Submit

- 11) Select **Submit**. The user details have been amended. You are now returned to the User Administration screen.

## Expiring User Accounts

Use this function to cause a user's account to expire, if it is no longer required – for example, if they leave the HEP or their role within the HEP changes. Please note that once a user's account is expired, their records cannot be amended or reinstated.

From the Users List click on a username to display the **Profile** screen. Select **Expire Account**. The **Confirm Details** screen will display.

Confirm Details for TAYLORLN		Help
This user is being expired.		
Service Group	N/A	
User Base	HEIs	
User	TAYLORLN	
Forename	LYNLEY	
Surname	TAYLOR	
Contact Number	0131 5555 5555	
Email	lynley@hei.co.uk	
Expired	<input checked="" type="checkbox"/>	
Group Memberships		Help
	Start Date	End Date
Role Memberships		Help
	Start Date	End Date
Authentication Methods		Help
	Set/Re-set	Lock
		<a href="#">Back</a> <a href="#">Submit</a>

Choose **Submit**. The user's details have now been expired. You are now back at the User Administration screen.