

Quick Guide – Creating a New User

Why?

The HE Gateway includes a facility to create and maintain user accounts which provides users access to student information. Depending on the level of access assigned, the ability to carry out actions such as confirming registration, attendance and submitting Change of Circumstances (CoCs) within the Student Information Service (SIS) is also possible.

Who?

When a person within an HEP requires access to SIS to carry out the responsibilities of their role, they will need to be set up as a user. This could be a new member of staff or a department move for an existing staff member into the area with responsibility for student administration.

Access

To create and maintain user accounts you must hold **User Administrator** access within the HE Portal which is set up by the Student Loans Company (SLC) when a provider initially joins the service.

The User Administrator(s) within an institution has the following responsibilities:

- To administer those within their HEP with access - any access and the associated roles given to each user must be appropriate to their employed role
- To remove access to the HE Gateway immediately when a user leaves the HEP's employment
- Undertake bi-annual audits of access arrangements to remove any non-users.

If the User Administrator is leaving their current provider, where possible they should ensure that they set up another member of staff with the same access before they finish, ensuring continuity. If those with User Administrator access rights leave the organisation without having set up another member of their staff, SLC will be required to verify another member of staff and their details before allowing this role to be applied.

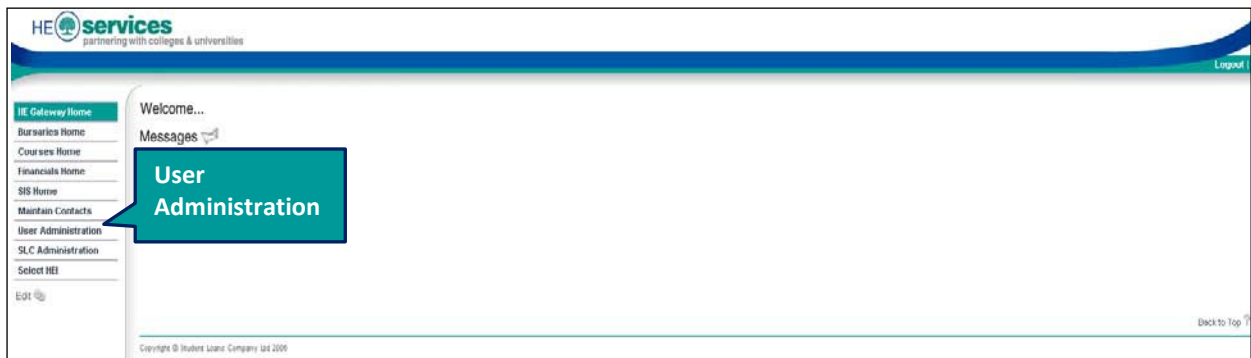
Administering System Users

Accounts are created using a defined structure of a User Base, then User Group and User Role. The User Administrator(s) within your HEP are responsible for creating and administering system users for your HEP.

User Base	A user base is a collection of users – for HEPs, the different service user bases within the Gateway are: HEIs – Bursaries , HEIs – Courses , HEIs – Financials , HEIs – SIS
User Group	A user group is an organisational group with which a user is associated. The user group determines which customer records a user can process. For HEP users, this will be the name of their HEP (and any associated HEPs where applicable).
User Role	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 5

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
User Base	Service Group	HEI Services			
	User Base	SLC HEI Business Services			
User Group	User Group	SLC HEI Business Development			
	Edit / View	Username	Surname	Forename(s)	Expired
User List	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 – from the page that displays, choose **Create New User** located on the bottom-right of the screen – the **Profile for New User** page will display.

Profile for New User Help

Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Contact No	<input type="text"/>
Email address	<input type="text"/>
Expired	<input type="checkbox"/>

Back | Authorisation and Authentication

- 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.

Group Memberships for: New User Help

Group	Start Date/Time	Add Group	End Date/Time
ASKHAM BRYAN COLLEGE	15/Jun/2006	Add Group	

Back | Continue

- 4) Select a **Group** that you wish to assign to the user from the drop down box – this will be the HEP name.
- 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.

Role Memberships for New User Help

Role	Start Date/Time	Add Role	End Date/Time
HEI User	15/Jun/2006	Add Role	

Back | Continue

- 8) Select a **Role** that you wish to assign to the user from the drop down box – please refer to the information on System Roles on page 5 for more information.
- 9) Select **Add Role**
- 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 user details including memberships and login details. **You must capture the details on this page 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
	Start Date	End Date
ASKHAM BRYAN COLLEGE	15/Jun/2006	
Role Memberships		Help
	Start Date	End Date
HEI User	15/Jun/2006	
Authentication Methods		Help
	Set/Re-set	Lock
Single Sign On	<input checked="" type="checkbox"/>	<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.

User Roles

Service users have 'roles' associated with their logins – these roles determine their level of access to the system, which determines what information they can access and the actions they can perform. Staff can be assigned more than one role by their User Administrator.

HEI User	This role must be assigned to all HEP users – it enables basic functionality, such as viewing pages correctly.
HEI Student Information Advisor	HEP users who can access the view Student Information Screen to deal with general enquiries, on a read only basis.
HEI Registration Administrator	HEP users who will be able to view and maintain the Registration Worklist.
HEI Attendance Administrator	HEP users who will be able to view and maintain the Attendance Worklist.
HEI Combined Administrator	HEP users who will be able to view and maintain the Combined Worklist.
HEI CoC Advisor	HEP users who can access the List of CoCs screen to deal with general enquiries, on a read only basis.
HEI CoC Administrator	HEP users who will be able to view and maintain the CoC Worklist.
HEI SIS Report Advisor	HEP users who can access the SIS Reports to deal with general enquiries, on a read only basis.
HES SIS User Administrator	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.