

Quick Guide – Administering Existing Users

Why?

When a user is unable to remember their login details they will require their password to be reset to allow them to gain access to the Student Information System (SIS).

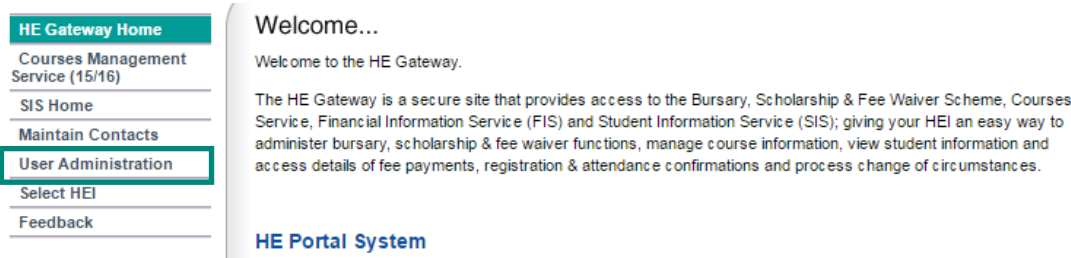
Access

To reset a user password you must hold User Administrator access within the HE Portal which is set up by the Student Loans Company (SLC) when a provider is initially set up.

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.

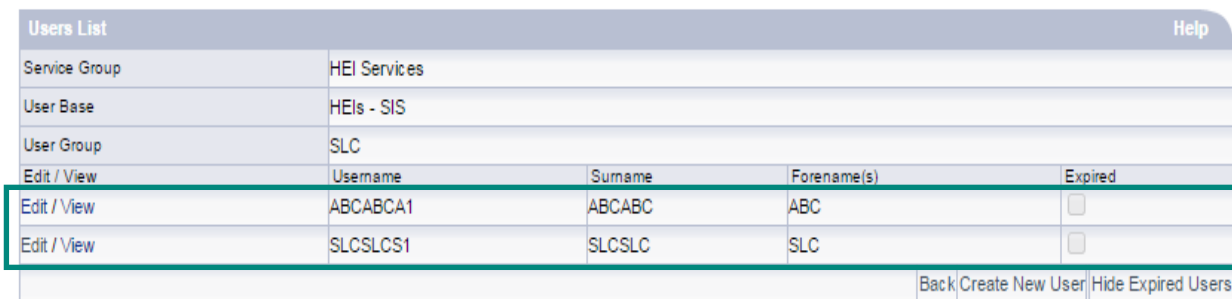
- 1) To begin administering users, select **User Administration** from the HE Gateway Home page.



The screenshot shows the HE Gateway Home page. On the left is a navigation menu with the following items: HE Gateway Home, Courses Management Service (15/16), SIS Home, Maintain Contacts, **User Administration** (highlighted with a red box), Select HEI, and Feedback. The main content area has a 'Welcome...' message and a paragraph describing the HE Gateway as a secure site for various services. At the bottom, there is a link for 'HE Portal System'.

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.

- 2) Select a User Group to show the **User List**.



Users List					Help
Service Group	HEI Services				
User Base	HEIs - SIS				
User Group	SLC				
Edit / View	Username	Surname	Forename(s)	Expired	
Edit / View	ABCBCA1	ABCABC	ABC	<input type="checkbox"/>	
Edit / View	SLCSLCS1	SLCSLC	SLC	<input type="checkbox"/>	
					Back Create New User Hide Expired Users

- 3) From the **Users List**, click on **Edit** to display the **Profile** screen.



The screenshot shows the 'Profile for SLCSLCS1' screen. It contains a form with the following fields: Forename(s) (SLC), Surname (SLCSLC), Contact No (0), Email address (test@slc.co.uk), and Expired (checkbox). At the bottom, there are links for 'Back', 'Expire Account', 'Authorisation and Authentication', and 'Reset Password'.

Amending Profile Details

Following on from the **Profile** screen outlined in the steps above:

- 1) You can amend a user's profile – name and contact details – by overtyping the fields displayed. Please note that amending the name fields will not result in a regenerated username for that user.

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

- 2) Once the details have been updated, select **Authorisation and Authentication**

Profile for SLCSLCS1		Help
Forename(s)	SLC	
Surname	SLCSLC	
Contact No	0	
Email address	test@slc.co.uk	
Expired	<input type="checkbox"/>	
		Back Expire Account Authorisation and Authentication Reset Password

3) Select **Continue** – the **Group Memberships** screen for this user will display.

Group Memberships for SLCSLCS1			Help
Group	Start Date/Time	End Date/Time	
SLC	18/Apr/2018 16:01:50	Expire	
SLC ▼	19/Apr/2018 13:00:09	Add Group	
			Back Continue

4) Select **Continue** – the **Role Memberships** screen for this user will display.

Role Memberships for SLCSLCS1			Help
Role	Start Date/Time	End Date/Time	
HEI Student Information Advisor	18/Apr/2018 16:11:35	Expire	
HEI User	18/Apr/2018 16:03:37	Expire	
HES SIS User Administrator	18/Apr/2018 16:13:21	Expire	
HEI Attendance Administrator ▼	19/Apr/2018 13:06:40	Add Role	
			Back Continue

5) Select **Continue** – the **Credentials** screen will display.

Credentials for SLCSLCS1			Help
Method	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Continue

6) Select **Submit**

Confirm Details for SLCSLCS1		Help
Service Group	HEI Services	
User base	HEIs - SIS	
User	SLCSLCS1	
Forename	SLC	
Surname	SLCSLC	
Contact Number	0	
Email	test@slc.co.uk	
Expired	<input type="checkbox"/>	

Group Memberships			Help
	Start Date	End Date	
SLC	18/Apr/2018 16:01:50		

Role Memberships			Help
	Start Date	End Date	
HEI Student Information Advisor	18/Apr/2018 16:11:35		
HEI User	18/Apr/2018 16:03:37		
HES SIS User Administrator	18/Apr/2018 16:13:21		

Authentication Methods			Help
	Set/Re-set	Lock	
Single Sign On	<input type="checkbox"/>	<input type="checkbox"/>	
			Back Submit

Amending Roles and Login Details

Following on from the **Profile** screen outlined in the steps above in the **Administering Existing Users** section:

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

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

- 2)
 - a. 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.
 - b. Select **Add Group** to add, or **Expire** to delete.
 - c. Repeat steps 2 and 3 until you have added or deleted all the groups you wish to amend for the user.
 - d. Select **Continue**. The **Role Memberships** screen for this user will display.

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

- 3)

- a. 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.
- b. 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.
- c. 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

4)

- a. 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.
- b. 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

- 1) Select **Submit**. The user details have been amended. You are now 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.