

## Quick guide

# Creating a new user

The HE Gateway gives users access to student information. Depending on your level of access, you can confirm student registration and attendance, as well as submit Change of Circumstance notifications (CoCs) in the Student Information Service (SIS). User Administrators can also create and maintain user accounts on the HE Gateway.

### Who?

When a staff member needs access to SIS, they will need to be set up as a user. This could be a new member of staff or an existing staff member who has moved to a student administration role.

### Access

To create and maintain user accounts you must hold **User Administrator** access on the HE Gateway. We set this up when a university or college initially joins the service.

The User Administrators have the following responsibilities:

- to set up and maintain HE Gateway access for staff members – any roles and access given users must be appropriate to their job role
- to remove HE Gateway access immediately when a user leaves the university or college
- to undertake biannual audits of access rights and remove any non-users

If the User Administrator is leaving the university or college, they should set up another member of staff with the same access before they finish. This helps to ensure continuity. If a User Administrator leaves the organisation without having set up a new User Administrator, we will need to verify another member of staff and their details before we can give them this role.

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## Administering system users

HE Gateway accounts are created using a defined structure of a User Base, then User Group and User Role. Your User Administrators are responsible for creating and administering system users for your organisation.

<b>User Base</b>	A user base is a collection of users. The different service user bases on the HE Gateway are: <b>HEIs – Bursaries, HEIs – Courses, HEIs – Financials, HEIs – SIS.</b>
<b>User Group</b>	A user group is an organisational group with which a user is associated. The user group determines which student records a user can process.  This will be the name of your university or college (and any associated higher education providers).
<b>User Role</b>	A user role is the level of system access a user has. A user can have a number of roles, depending on their level of access and responsibility. See System Roles on page 5.

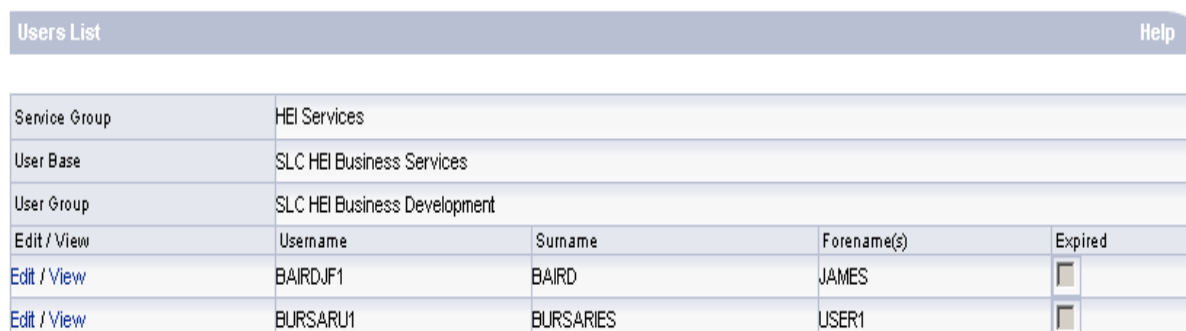
## Using the User Administration function

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

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

If you have access to a single user group, or if you have already selected a user group, you will see the **Users List**.

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



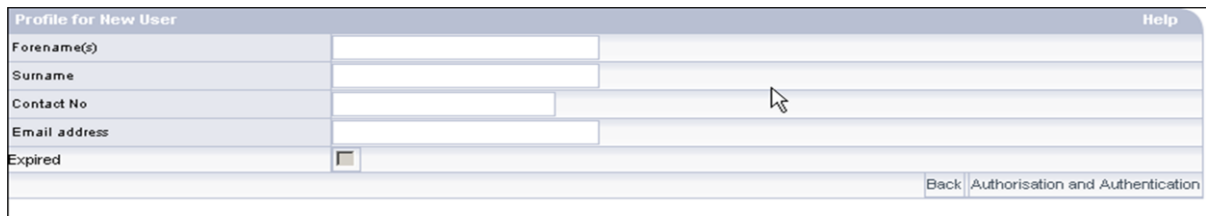
The screenshot shows the 'Users List' page with a 'Help' link in the top right corner. Below the header is a table with the following data:

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

This image shows the **User Administration** page.

## Creating new users

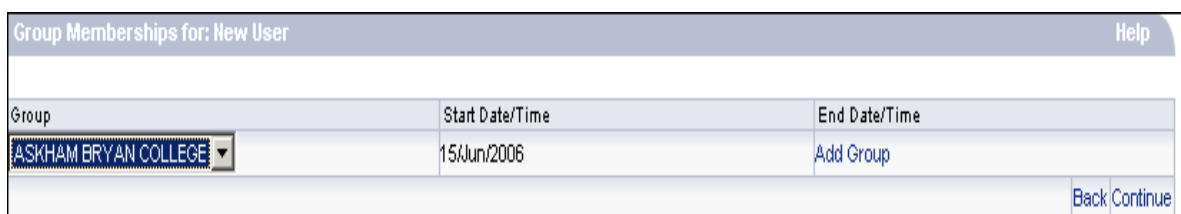
- 1) Select **User Administration** from the **HE Gateway Home** page. In the bottom right of the next page, choose **Create New User** – You will now see the **Profile for New User** page.



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"/>	
		<a href="#">Back</a> <a href="#">Authorisation and Authentication</a>

This image shows where to enter information when you are creating a new user.

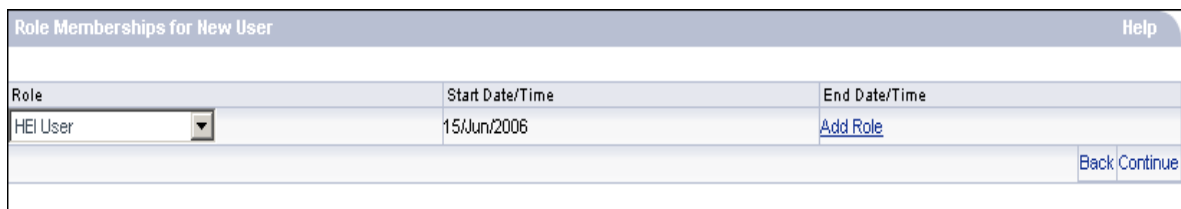
- 2) Enter the new user's details: **Forename(s)**, **Surname**, **Contact No** and **Email address**. These are all mandatory fields.
- 3) Select **Authorisation and Authentication**. You will now see the **Group Memberships** screen.



Group Memberships for: New User			Help
Group	Start Date/Time	End Date/Time	
<input type="text" value="ASKHAM BRYAN COLLEGE"/>	15/Jun/2006	<a href="#">Add Group</a>	
			<a href="#">Back</a> <a href="#">Continue</a>

Image showing the selection of a group membership.

- 4) Select a **Group** that you wish to assign to the user from the dropdown box – this will be the name of your university or college.
- 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**. You will now see the **Role Memberships** screen.



Role Memberships for New User			Help
Role	Start Date/Time	End Date/Time	
<input type="text" value="HEI User"/>	15/Jun/2006	<a href="#">Add Role</a>	
			<a href="#">Back</a> <a href="#">Continue</a>

Image showing the selection of user membership.

- 8) Select a **Role** that you wish to assign to the user from the dropdown box. Please see the section about 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**. You will now see the **Credentials for New User** screen.

12) Select **Continue** – this screen is to set and reset sign-in details, which is not necessary when creating a new user.

13) You will see the **Confirm Details** screen. This shows user details including memberships and sign-in details.

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HE Gateway Home

Bursaries Home

Courses Management Service Home

SIS Home

Maintain Contacts

User Administration

SLC Administration

HEI Bank Details

Service Subscriptions

Select HEI

This image shows the screen where you can review the details submitted

Confirm Details for TESTERTE1		
Service Group	HEI Services	
User base	HE Services User Admin	
User	TESTERTE1	
Forename	TEST	
Surname	TESTER	
Contact Number	01224 111111	
Email	test@tester.COM	
Expired	<input type="checkbox"/>	

Group Memberships		
	Start Date	End Date
HE Services User Admin	03/Jul/2020 12:36:12	

Role Memberships		
	Start Date	End Date
HE Services Reassessment Administrator	03/Jul/2020 12:36:13	

Authentication Methods		
Single Sign On	Lock <input type="checkbox"/>	Unlock <input checked="" type="checkbox"/>

Back Submit

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

15) Your temporary password will be sent to your email address

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## User roles

Service users have roles associated with their accounts. These roles determine their level of access to the system, which determines what information they can access and what actions they can perform. A User Administrator can give a staff member more than one role if necessary.

HEI User	This role must be assigned to all users. It enables basic functionality, such as viewing pages correctly.
HEI Student Information Advisor	Users who have read-only access to the <b>View Student Information</b> screen to deal with general enquiries.
HEI Registration Administrator	Users who can view and maintain the <b>Registration Worklist</b> .
HEI Attendance Administrator	Users who can view and maintain the <b>Attendance Worklist</b> .
HEI Combined Administrator	Users who can view and maintain the <b>Combined Worklist</b> .
HEI CoC Advisor	Users who have read-only access to the <b>List of CoCs</b> screen to deal with general enquiries.
HEI CoC Administrator	Users who can view and maintain the <b>CoC Worklist</b> .
HEI SIS Report Advisor	Users who have read-only access to the <b>SIS Reports</b> screen to deal with general enquiries.
HES SIS User Administrator	Users who will perform user maintenance functions in their organisation. This includes setting up new users, allocating roles and resetting passwords.

