

# Quick guide

## Administering existing users

If a user has forgotten their sign-in details, their password will need to be reset so they can access the Student Information Service (SIS).

### Access

To reset a user password you must hold User Administrator access to the HE Gateway. We set this up when a university or college first joins the service.

### Administering existing users

As a User Administrator, you can:

- amend a user’s profile (name and contact details)
- expire a user’s account
- amend a user’s user roles and groups
- reset, cancel or activate sign-in details

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

If you only have access to a single user group, the **Users List** will appear. If you have access to more than one user group, you must select the **User Group** to see the corresponding **Users List**.

- 1) Select a user group to show the **Users List**.

Users List					Help
Service Group	HEI Services				
User Base	HEIs - SIS				
User Group	SLC				
Edit / View	Username	Surname	Forename(s)	Expired	
Edit / View	ABCABCA1	ABCABC	ABC	<input type="checkbox"/>	
Edit / View	SLCSLCS1	SLCSLC	SLC	<input type="checkbox"/>	
				Back	Create New User   Hide Expired Users

This image shows where the Edit button is.

- 2) From the **Users List**, select **Edit** to see the **Profile** screen.

## Amending profile details

Following on from the **Profile** screen:

- 1) You can amend a user's name and contact details by overtyping the information in these fields. If you change a user's name here, their system username will not change.

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

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

- 3) Select **Continue**. You will see the **Group Memberships** screen for this user.

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

This image shows where to click Continue.

- 1) Select **Continue**. You will see the **Role Memberships** screen for this user.

- 2) Select **Continue**. You will see the **Credentials** screen.

- 3) 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

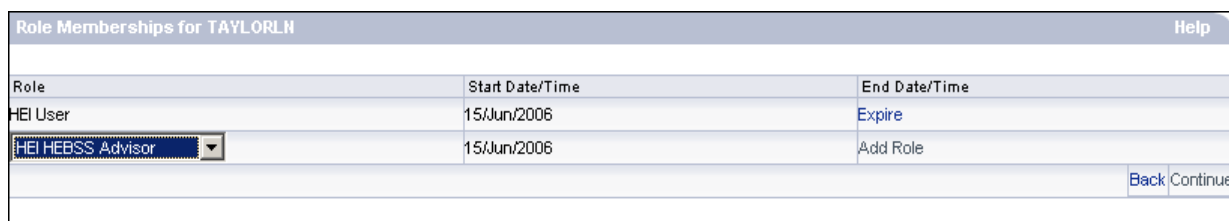
This image shows where the Submit button is.

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## Amending roles and sign-in details

Following on from the **Profile** screen:

- 1) Select **Authorisation and Authentication**. You will see the **Group Memberships** screen for this user.
  
- 2)
  - a. If you want to amend the user's group membership, select the **Group** that you want to add or remove from the dropdown menu.
  
  - b. Select **Add Group** to add, or **Expire** to remove.
  
  - c. Repeat steps 2 and 3 until you have added or removed all the groups you want to amend for the user.
  
  - d. Select **Continue**. You will now see the **Role Memberships** screen for this user.



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	
			Back Continue

This image shows the Role Memberships screen.

- 3)
  - a. If you want to amend the user's roles, select a **Role** that you want to add or remove from the dropdown menu. See System Roles on page 9 for more information on user roles.
  
  - b. Select **Add Role** to add, or **Expire** to remove the user's access. Repeat steps 6 and 7 until you have added or removed all the roles you want to amend.
  
  - c. Select **Continue**. You will now see the **Credentials** screen for this user.

- 3) Select **Continue**. You will see the **Confirm Details** screen, showing user details such as memberships and sign-in information.

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"/>
		<a href="#">Back</a> <a href="#">Submit</a>

This image shows the Confirm Details page.

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

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## User roles

System 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. The User Administrator can assign more than one role to each user if necessary.

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