One Training Manager
Courses Citizen Portal

last updated for the Spring 2018 release

Handbook

CAPITA

Revision History

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www.capita-one.co.uk

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on My Account.

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

01 | One Citizen Self Service

Overview

The One Citizen Self Service portal is a secure online gateway provided by the Local Authority. It enables school staff members, governors and members of the general public to search for and make applications for training courses and track progress of course applications. Users can view and complete their incomplete applications and view course applications they have made in the past.

The user can search for courses without registering or logging into the Citizen portal. To make an application, they must register with the Citizen portal and log in.

In order for users to apply for training courses the LA needs a licence for Portal Training Manager.

The Citizen portal also enables parents, guardians and carers to apply for the following services, depending on the modules purchased by the Local Authority:

- School Places
- Free School Meals
- Transport
- Courses
- Funded Early Education for Two Year Olds
- Special Educational Needs and Disabilities.

These applications are then transferred into One for loading into the appropriate modules:

Citizen Self Service Portal	One
School Places	Admissions and Transfers v4
Free School Meals	Grants and Benefits v4
Transport	Transport v4
Courses	Training Manager v4
Funded Early Education for 2 year olds	Early Years v4
Special Educational Needs & Disabilities	SEND v4

Citizen Portal Admin

The Citizen Portal Admin functionality is available to Local Authorities in One v4 Online, subject to licences and v4 Client permissions. It is accessed by clicking the **Citizen Portal Admin button** on the One v4 Online Home page.

> *NOTE: Throughout the Citizen portal, clicking in a field displays a tooltip containing information on the selected field. Tooltips are managed via* **Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title***.*

More Information:
Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website.

Using this Handbook

This handbook is intended for One Administrators at the Local Authority. It describes the administration processes performed by the authority. Chapter 4 provides an overview of the course application process performed by a Citizen portal user.

What's New in this Release?

This handbook has been updated to include a chapter about GDPR Administration. For more information, see Introduction to GDPR Administration on page *17*.

When a user registers to use the Citizen portal to apply for courses, they are asked to agree to the GDPR Consent Statement. They can also withdraw their consent and view their consent history. For more information, see Introduction to Courses on page *25*.

02 | **Managing Users**

Introduction

Citizen Self Service Portal Administrator

In order to be a Citizen Self Service Portal administrator, you <u>must</u> satisfy the following conditions:

- In One v4 Client:
    - be set up as a user.
    - have a valid email address.
    - belong to a group.
    - you need group permissions to be set.
- In One v4 Online:
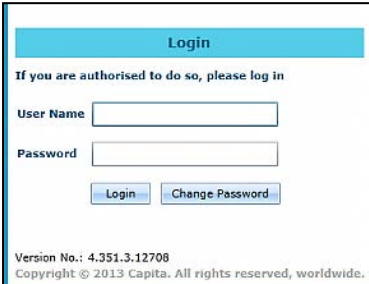   - your LA must have a Citizen Portal licence key.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website via the Technical link.


Logging in to One v4 Online

To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

1. Open the **Login** screen by clicking the link to the One Online web server, set up by your System Administrator.

2. Enter your **User Name**; this is the same as your v4 Client user name.

3. Enter your **Password**; this is the same as your v3 password. Passwords are case sensitive. To change your password, see <u>Changing a Password</u> on page *4*.

4. Click the **Login** button to display the **Welcome to One** page.
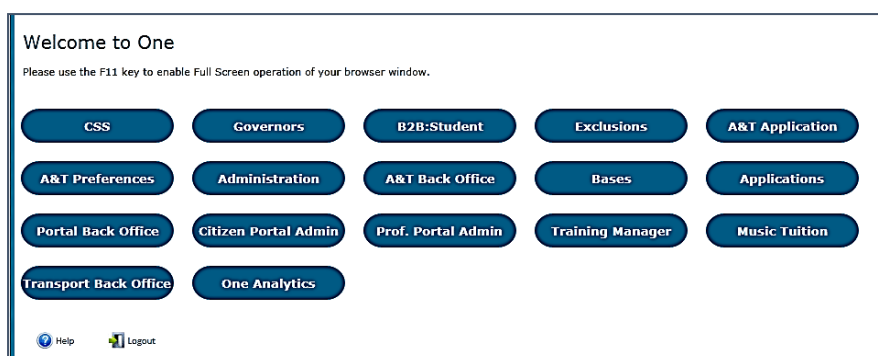
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

> **More Information:**
> *RG_Online_Administration_Login_Logout* available from the **One Publications** website via the **Reference Guides** link and **My Account**.

Changing a Password

To change your password in v4 Online:
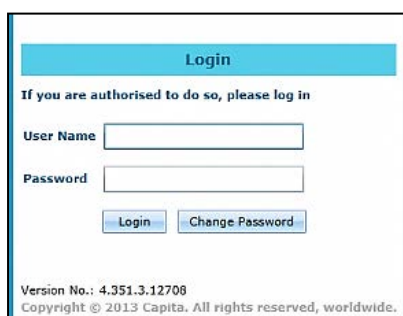
1. Click the **Change Password** button on the **Login** screen to display the **Change Password** dialog.

2. On the **Change Password** dialog, enter your **Old Password**.

3. Enter your **New Password**.

4. Enter your new password again in the **Confirm New Password** field.

5. Click the **OK** button.

> **More Information:**
> *RG_Online_Administration_Login_Logout* available from the **One Publications** website via the **Reference Guides** link and **My Account**.

Forgotten Password

If you have entered an incorrect email address or password, the following message is displayed:

There were problems logging you in.

Email Address/Password is incorrect.
Please try again.

Check that you have entered the correct email address.
If you have forgotten your password, it will need to be reset.
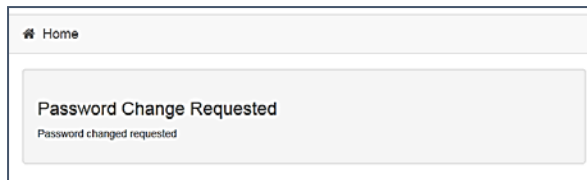
To reset a password:

1. Click the **Forgotten your password?** link to display the **Forgotten Password** dialog.

2. Enter your email address, then click the **Continue** button to display the **Secret Question** dialog.

3. Enter the **Secret Answer** you provided when registering, then click the **Submit** button. A message informs you that a password change has been requested.

The Local Authority will send an email, similar to the one below, to the registered email address.
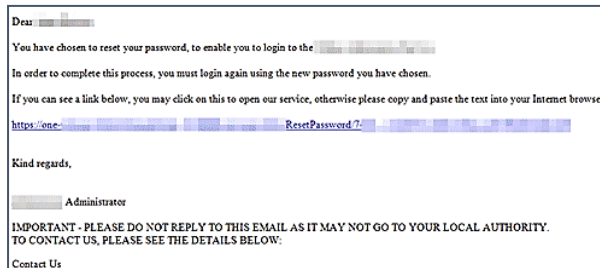
4. Click on the link in the email to access the Citizen Portal website.
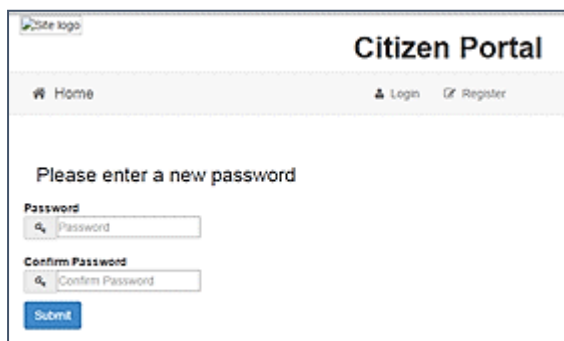
5. Enter your new **Password**. Passwords are case sensitive.

6. Enter your new password again in the **Confirm Password** field.

7. Click the **Submit** button. A message confirms that you have successfully changed your password.

8. Click the **Login** button to log in to the Citizen Portal with your new password.

Logging in to Citizen Portal Admin

The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4 Client | Tools | Permissions | User Group Permission**s.

To log in to the One Citizen Self Service Portal Admin:

1. Log in to v4 Online. For more information see Logging in to One v4 Online on page 3.
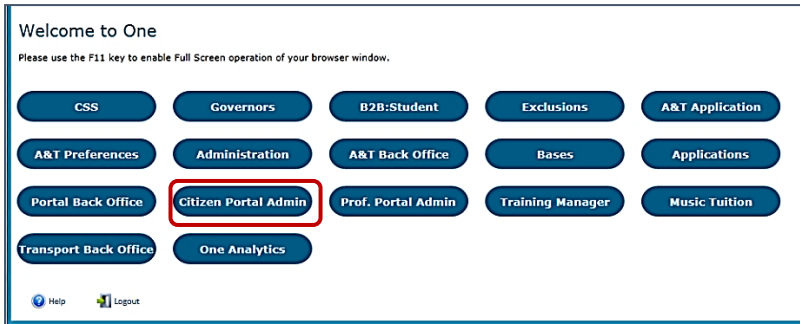
2. Click the **Citizen Portal Admin** button to display the **Announcements** page.

The **Announcements** page displays only if there are announcements regarding the portal.

3. Click the **Continue** button to display the **Home** page.

The Announcements page is edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks.	
Announcements	Placeholder_Title
Announcement Start Date	Placeholder_Forename
Announcements End Date	Placeholder_Surname

NOTE: If there are no announcements, clicking the **Citizen Portal Admin** button displays the **Home** page.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

One Training Manager Courses Citizen Portal Handbook

03 | **General Administration**

The Citizen Portal Home Page

The **Citizen Portal Home** page is divided into the following two sections:

- **Administration**.
- **Local Authority.**

These can be accessed by clicking on the buttons or selecting an option on the navigation bar.

The footer displays the following links:
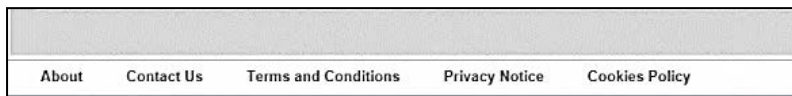
- **About Us** – displays information about the local authority. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About**.

- **Contact Us** – displays contact details such as address, phone numbers and email address. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_Contact**.

- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service Portal. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_TAndC**.

- **Privacy Notice** – displays additional information regarding privacy. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_PrivacyNotice**.

- **Cookies Policy** – displays information regarding the cookies that are placed on the user's computer when logging in to the portal. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_CookiesPolicy.**

Administration page

The **Administration** page is accessed via **v4 Online | Citizen Portal Admin | Home | Administration**.

The **Home Administration** page enables administration processes to be performed by the local authority:
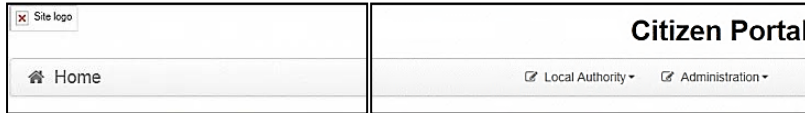
General Administration
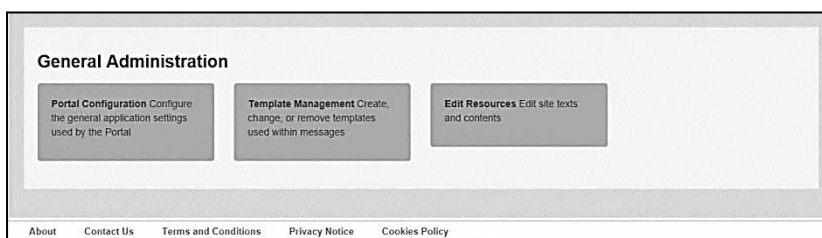
The **General Administration** panel enables you to perform the following tasks:

- **Portal Configuration** – configure the general application settings used by the portal.

- **Template Management** – Create, change or remove templates.

- **Edit Resources** – Edit site texts and contents. This enables your LA to configure the Citizen Portal with your local references and advice. Most standard text displayed within the Citizen Portal can be edited to more accurately reflect your LA's business processes.

The Citizen Portal header displays the Site logo. This is installed by the System Administrator when installing the Citizen Self Service portal.

Portal Configuration

An Administrator, with the appropriate permissions, can edit the Portal Configuration settings, thus changing the setup and the behaviour of the Citizen Self Service portal.

The **Portal Configuration** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration**. Click the **Portal Configuration** button to display the **Site Settings** page.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website.

Configuring the Site Settings

The **Site Settings** pages are accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration**. From here you can configure the following settings that are used in Training Manager:
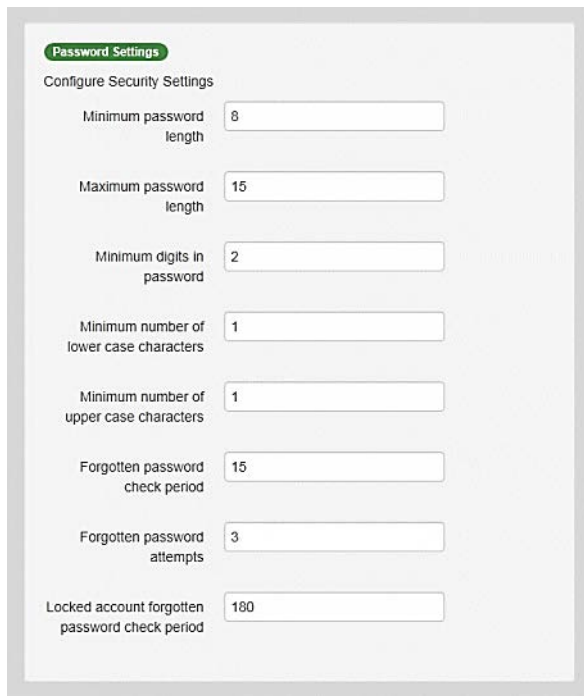
- Password Settings

- Application Settings

- Application Type Settings

- Cache.

Configuring Password Settings

The **Password Settings** panel is used to set the security settings applied to users during registration and login.

To configure the password security settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

2. On the **Password Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

3. Click the **Save** button.

Edit Resources

The **Edit Resources** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources**. From here you can edit the contents of the portal. The information in the tooltips is stored in the resource descriptions.

The following **Resource Configuration Descriptions** can be edited:

Text Resources

- Account
- Administration
- Admissions
- Citizen Thirty Hours Entitlement
- Free School Meals
- Home
- Home Tiles
- Local Authority
- Messaging
- SEND
- Shared
- Training Manager
- Transport
- Two Year Old Funding.

Markdown

- Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.

> **NOTE:** *You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions*.

Editing Resource Descriptions

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Citizen Self Service portal. If a **Resource Value** is changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

To edit the resource descriptions:

1. Select **Administration | General Administration | Edit Resources** to display the **Resource Configuration Title** page.
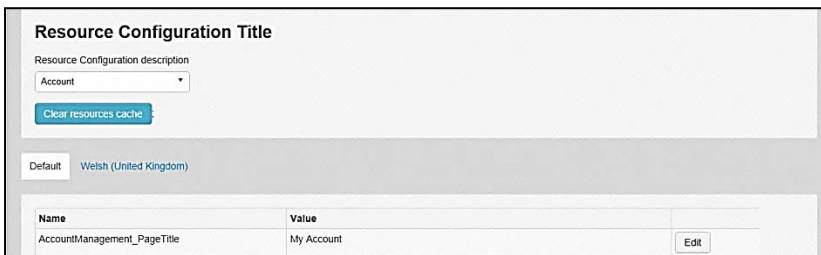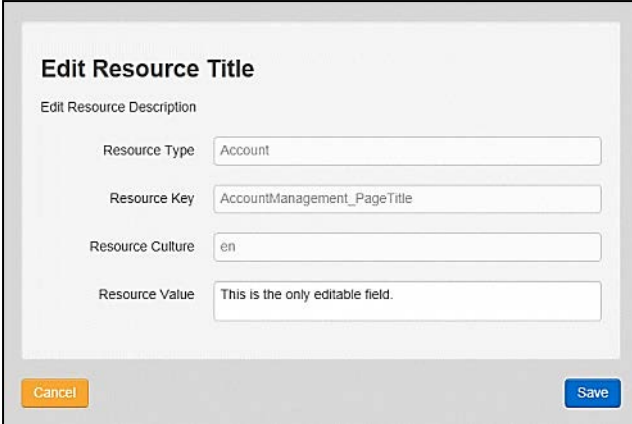
The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy-GB) descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the Descriptions and Values associated with the resource types.
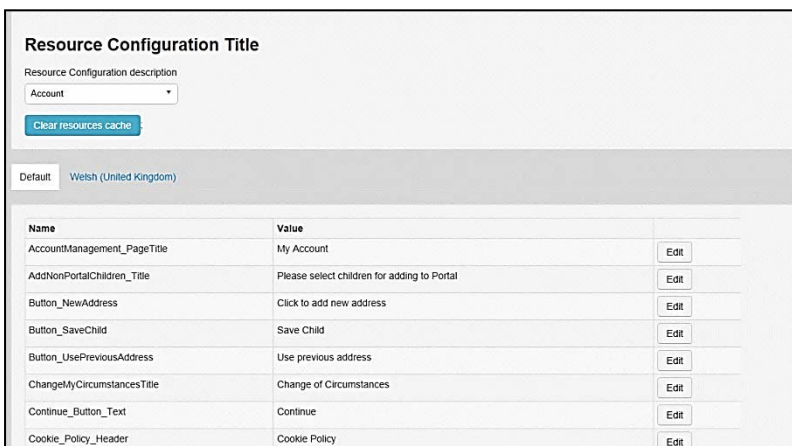
3. Click one of the **Edit** buttons next to a **Value** to display the **Edit Resource Title** dialog.

The following fields are read-only:

- **Resource Type** – the name of the resource configuration title.
- **Resource Key** – the resource database name.
- **Resource Culture** – en (English) or cy-GB (Welsh)

4. Enter your text in the **Resource Value** field.

5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

Configuring Automatic Emails

Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

- User indicates that they have forgotten their password.
- User changes their password.
- User changes their email address.
- User changes their secret question.
- Administrator resets a user's password (system sends forgotten password email to user).
- Administrator changes a user's email address (system sends a changed email address confirmation to user).

Note: Different text can be configured for the One Citizen Portal and the One Professional Portal versions of these emails.

This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

To configure the subject lines for the different email types, type *emailsubject* into the **Search** box to filter the resource list to display the new configurable email subject items.
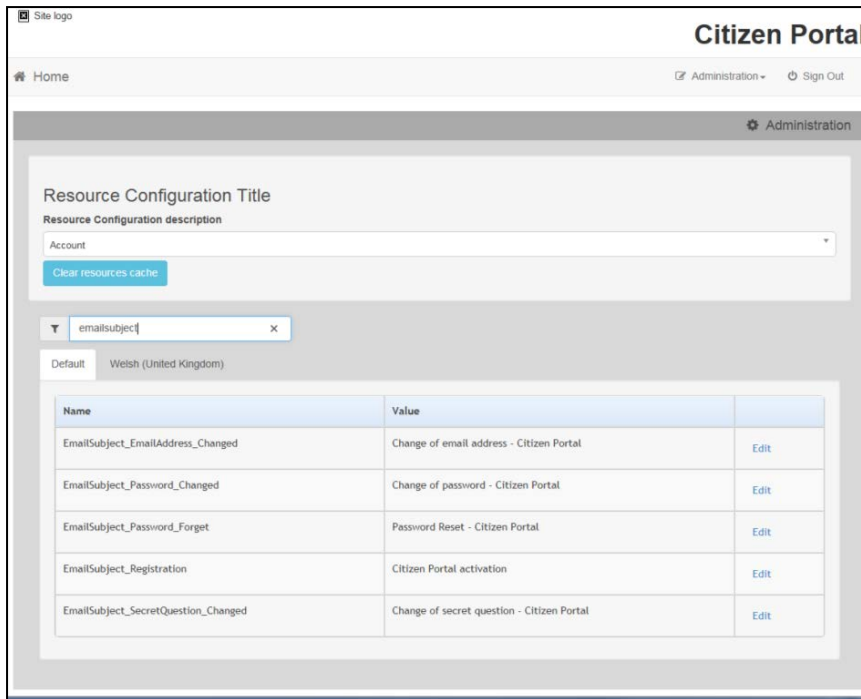
To configure the contents for the different email types, select **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Markdown | Text Blocks**. Default text has been automatically configured for each.

Type *email_* into the **Search** box to filter the list to display the new configurable content items for the different email types.
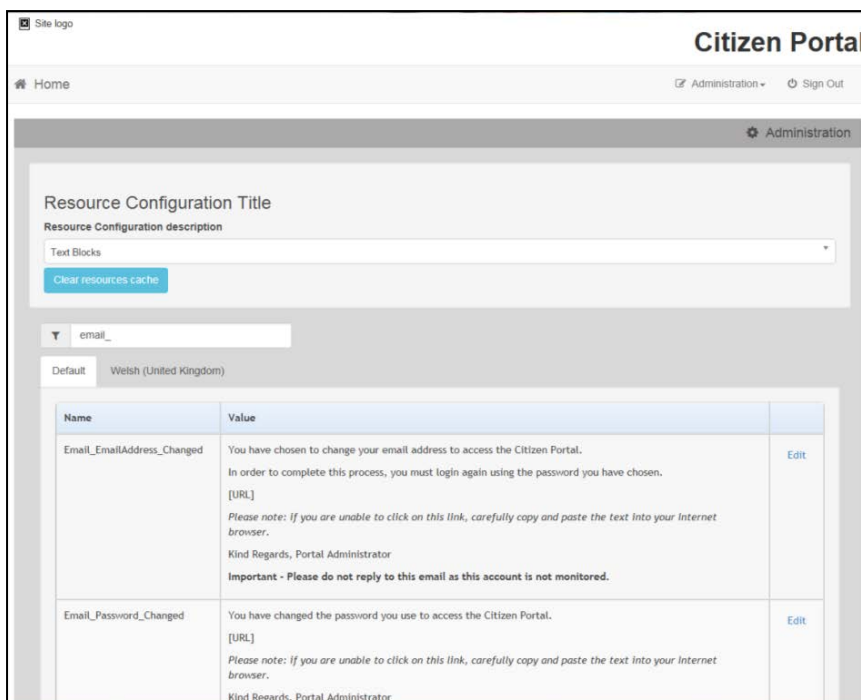
The configurable text block resource names are:

- Email_EmailAddress_Changed

- Email_Password_Changed

- Email_Password_Forget

- Email_Registration
- Email_SecretQuestion_Changed.

Cache

The cache is a temporary storage area used to speed up the retrieval of system information. The One system caches information that can take a long time to retrieve or require a large amount of memory. Sometimes issues can occur if the cached data is not updated when new data is entered into One. For example, a new transfer group has been added in One, but is not displaying in the Citizen portal. Clearing the cache forces a data refresh and displays the new data as expected.

The Cache page enables you to see which data is cached; cached data can be cleared from the system.

To clear the cache:

1. Select **Administration | General Administration | Cache** to display the list of cached items.
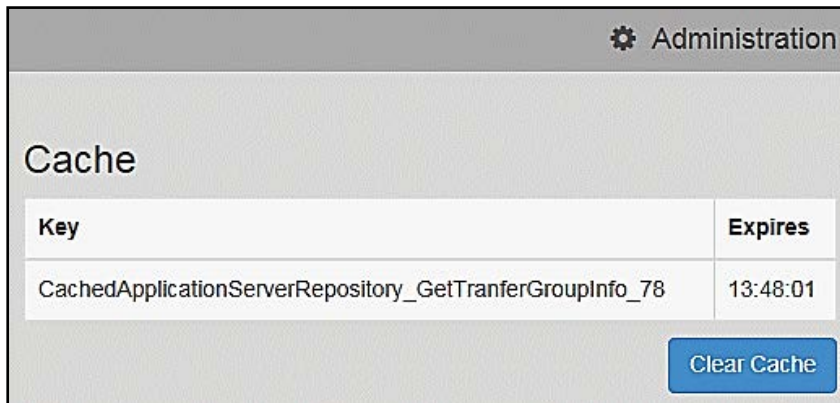
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
3. Click the **Save** button.

04 | **GDPR Administration**

Introduction to GDPR Administration

GDPR

GDPR Administration is used to set up and manage GDPR consent. It is accessed via the **GDPR Administration** menu route or by clicking the **GDPR Administration** tile on the Citizen portal home page.
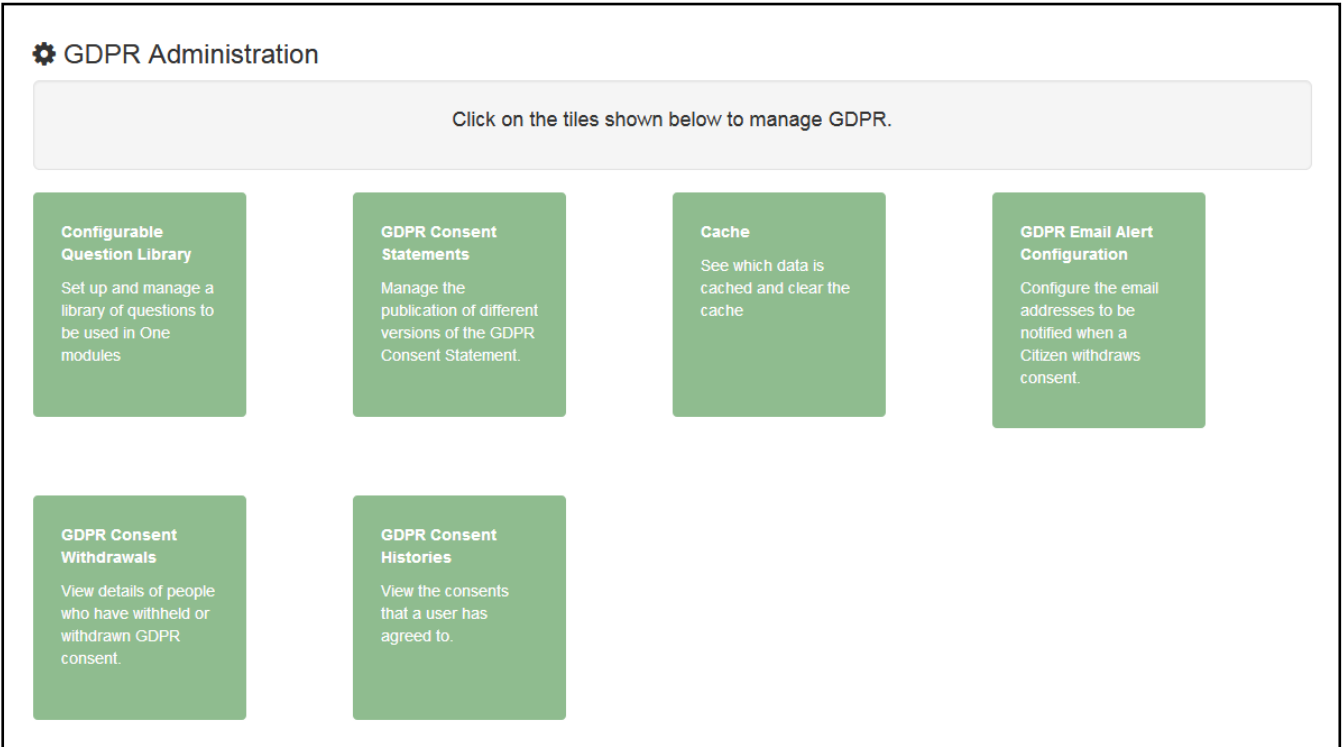
You can only access the **GDPR Administration** area if you have **Read-Write** permision for the **GDPR Administration** business process as shown in the following graphic:

Permisions are set up in the v4 Client via **Tools | Permissions**.

Setting Up Questions

The **Configurable Questions Library** page enables you to set up the questions to be included in consent statements. Consent statements are used to request agreement from a citizen to hold and process their personal data.

The page is accessed via **GDPR Administration | Configurable Question Library**.

Adding a New Question

You can add a new question and save it in the Configurable Questions Library. The text can be previewed to see how it will be displayed to a user.

1. Select **GDPR Administration | Configurable Question Library** to display the **Configurable Questions Library** page.

2. Ensure that **GDPR Consent Statement** is selected from the drop-down.

3. Click the **Add new tick box question** button to display the **Tick Box Question Editor** window.

4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement..

5. Enter the **Consent Agreement Text** (in either English or Welsh), This is the question text that is presented to the user with a tick box asking them to agree that their personal data is held in accordance with the contents of the Consent Statement.

6. If required, click the **Make this question active** button.

7. If required, click the **Preview (English)** or **Preview (Welsh)** button.

8. Click the **Save** button.

Publishing a Consent Statement

The GDPR Consent Statement Schedule enables you to view the details of published consent statements, schedule a new statement or delete a scheduled statement that has not yet been published.

Adding a New Consent Statement

To add a new statement, select a single question from the Configurable Questions Library.

1. Select **GDPR Administration | GDPR Consent Statements** to display the **GDPR Consent Statement Schedule** page.

2. Click the **Add New** button to display a list of consent statements that have been stored in the question library.
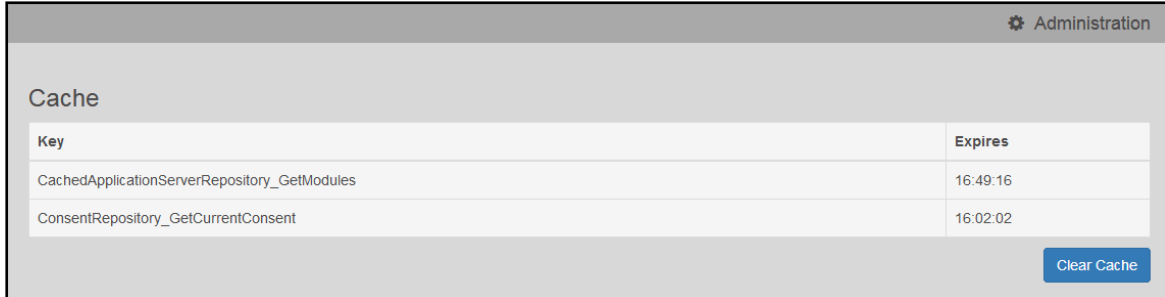
3. Select the radio button adjacent to the required statement and click the **Save** button.

Clearing Cache

To view cached data and clear it:

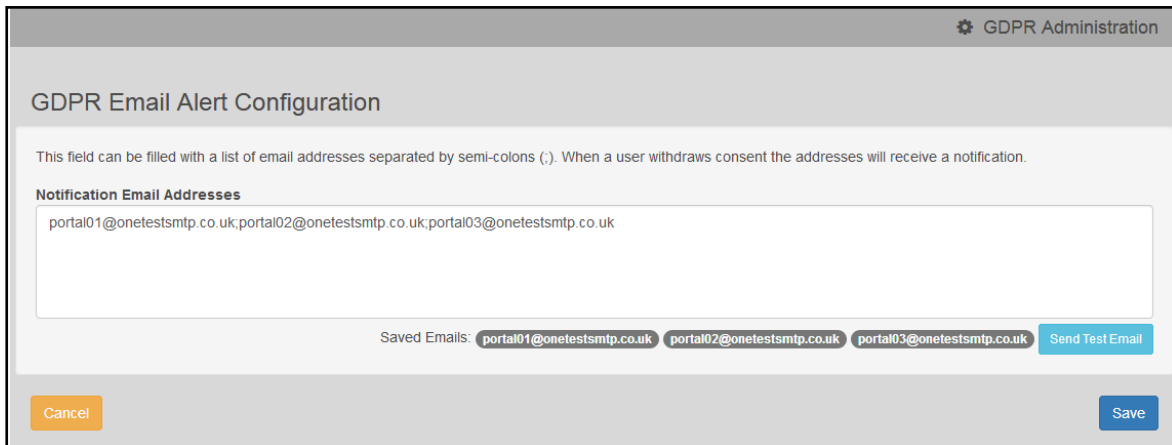1. Select **GDPR Administration | Cache** to display the **Cache** page.

2. If required, click the **Clear Cache** button.

Configuring Email Alerts

To set up a list of email addresses that will receive a notification when a user withdraws GDPR consent:

1. Select **GDPR Administration | GDPR Email Alert Configuration** to display the **GDPR Email Alert Configuartion** page.

2. Enter the required **Notification Email Addresses**, separated with a semi-colon.

3. If required, click the **Send Test Email** button to send a test email to each address.

4. Click the **Save** button.

Viewing Consent Withdrawals

You can view a list of those who have withheld or withdrawn consent. You can view details of any associated children and mark the record as having been actioned.

1. Select **GDPR Administration | GDPR Consent Withdrawals** to display a list of people who have witheld or withdrawn GDPR consent.

2. If required, enter search criteria and click the **Search** button to display matching records.

3. If required, click the **Children** link to display details of chidren associated with this person.

4. If required, click the **Mark Actioned** button to update the **Action** status.

Viewing Consent History

To view a history of when a user has agreed or withdrawn consent:

1. Select **GDPR Administration | GDPR Consent Histories** to display the **GDPR Consent History** page.

2. Enter search criteria and click the **Search** button to display a history of consents for each person.

3. If required, click a **Name** in the list to display the **Consent History for User** panel.

GDPR Administration

05 | Courses

Introduction to Courses

The One Citizen Self Service portal enables governors, staff members or members of the general public to search for and make applications for training courses, integrating with the One Training Manager v4 module. Users can track the progress of course applications made online, view and complete any incomplete applications and view their historical course applications.

> *NOTE: Courses are only displayed in the Citizen Portal if they have been set up to be published on the portal. This is managed in Training manager v4 by selecting both the* **Publish on web** *check box via* **Courses | Basic Details** *and the* **Publish on Portal(s)** *check box via* **Courses | Additional Details***.*

> **More Information:**
> *One Training Manager v4 handbook* available on **My Account** and on the **One Publications** website (http://onepublications.com).
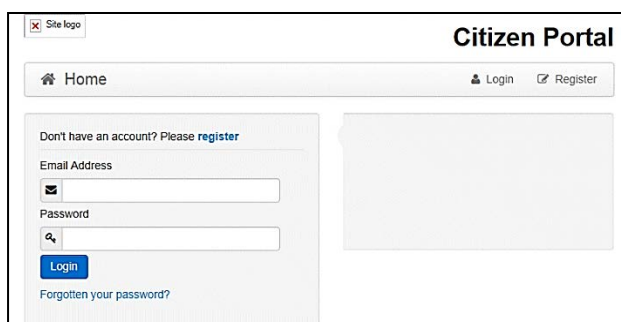
Registering for a Citizen Portal Account

Before a parent, carer, guardian or young person can log in to the One Citizen Self Service portal, they must create an account by registering with their local authority.

When they register, they will be asked to agree to the GDPR Consent Statement.

To register for a Citizen Self Service portal account the parent must complete the following procedure:

1. Open the URL for the One Citizen Self Service portal, sent by the local authority, in a web browser to display the **Citizen Portal Home** page.

2. Click the **Register** button on the navigation bar or click the **Please register** link on the **Login** panel to display the **Data Protection** window with the current GDPR Consent Statement.

Courses

Data Protection

You must provide consent for the Authority to use your information for the purpose shown below. If you do not wish to provide consent, you can not proceed with registration.

GDPR Consent Statement March (V2) 2018

Version 2

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ante. Nullam suscipit tortor dapibus velit condimentum, id dapibus nulla condimentum. Fusce vitae magna libero. Suspendisse sed dapibus risus. Nulla accumsan dui sit amet mollis efficitur. Nulla facilisis dolor ac posuere bibendum.

Nulla eu luctus nulla. Vivamus ac luctus justo. Sed sed massa turpis. Integer ac tellus ipsum. Vivamus enim augue, tincidunt eleifend venenatis eu, laoreet sed nisl. Donec porttitor nibh ac nunc convallis, et scelerisque felis condimentum. Etiam varius accumsan volutpat. Duis sit amet vestibulum velit. Duis vitae leo porta, cursus augue in, ultrices odio. Ut rutrum aliquet volutpat.

Donec nec ultricies arcu, id mattis massa. Aenean viverra mauris metus, ac lobortis enim maximus vel. Nunc et iaculis neque. Donec et neque suscipit, laoreet orci quis, ultricies leo. Mauris dictum ligula velit, vitae auctor odio fermentum id. Aenean id velit risus. Quisque sit amet rhoncus mi. Sed laoreet porta nibh eget eleifend. Sed sit amet urna sit amet odio ullamcorper consectetur. Aenean in metus nec odio gravida interdum. Curabitur vel risus ullamcorper, scelerisque eros id, tristique lacus. Cras hendrerit, dui sit amet ornare auctor, leo ligula bibendum dui, eget consequat ex metus lacinia augue. Sed eget vehicula sem. Mauris commodo nisi id odio tempus, pulvinar maximus leo fringilla. Cras dapibus malesuada lorem, id rutrum justo. Mauris porta nunc dui.

Curabitur in lacinia erat, sed porttitor ex. Ut nisi sapien, convallis sed vulputate eu, ullamcorper sit amet tortor. Sed id turpis vestibulum, eleifend lacus vel, egestas justo. Nam eget augue sodales, feugiat ipsum id, vestibulum libero. Aliquam id metus auctor, fringilla massa tempus, porta lectus. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Duis et arcu quis enim laoreet tempor.

🖒 ☐ I agree to the above usage policy

Continue

3. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.

Registration

You need to first register with us in order to apply for Free School Meals, Transport or for a School Place for your child(ren). This screen will guide you to enter the necessary information required for registration process. Please hover the mouse over each field to see what information you will need to enter for this purpose.

Email Address *	
Confirm Email *	
Password *	
Confirm Password *	
Secret Question *	0715 - TABLE_ID
Secret Answer *	
Title *	Please select
Forename *	
Surname *	
Gender *	Please select a gender

To find your home address please enter your postcode and then click Find Address. If you do not know your postcode, look it up here. If your address is not listed, press the 'Enter Address Manually' and type the correct address in the boxes provided

Postcode *	

Find Address
I don't have a Postcode

Please supply a telephone number where you can be contacted during normal office hours, if necessary.

Home Phone	
Mobile Number	
Work Phone	

Submit Registration

* Required field

4. Enter the requested security information.

5. Enter a **Postcode**; this is a mandatory field.

6. Click the **Find Address** button or use the on-screen instructions to find your address.

7. The **Home Phone**, **Mobile Number** and **Work Phone** are optional.

8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.

9. Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the password you created when you registered.

My Account

A Citizen Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

- Personal Details
- Contact Details
- Change Email Address
- Change Password
- Change Secret Question
- Change of Circumstances
- Two Step Verification
- Consent History
- Withdraw Consent.

Personal Details

To add your personal details:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Personal Details**.

4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

5. Click the **Save** button.

Contact Details

To add your contact details:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Contact Details**.

4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

5. Click the **Save** button.

Change Email Address

To change your email address:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Change Email Address**.

4. The following warning is displayed:

   Please be advised that you will be signed out of the system and an email will be sent to your new email address containing instructions. You will not be able to log back into the system until you have followed the instructions. Please ensure the email address supplied is correct.

5. Click the **Next** button..

6. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Change Email Address

New Email Address *

Confirm New Email *

Password *

Submit

7. Click the **Submit** button.

Change Password

To change your password:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Change Password**.

4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Change Password

Current Password *

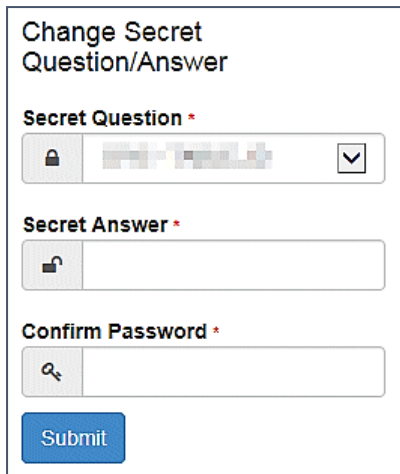New Password *

Confirm Password *

Submit

5. Click the **Submit** button.

Change Secret Question

To change your secret question and secret answer:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Change Secret Question**.

4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

5. Click the **Submit** button.

Change of Circumstances

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Change of Circumstances**.

   If you need to record a change to your circumstances, you must contact your local authority.

4. Click <u>Contact us</u> to open an email.

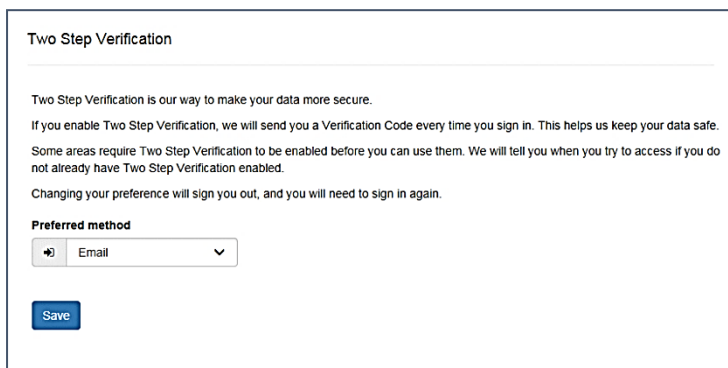5. Click the **Back** button to return to the **Home** page.

Two Step Verification

Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

> **NOTE**: *This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).*

Enabling Two Step Verification

To set up two step verification:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account at the top of the page.**

3. **Select Two Step Verification**.

4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.

5. Click the **Save** button.

   You will be signed out and will need to sign in again.

6. Log in; this time when you log in, the following dialog is displayed:

7. Locate the email containing your verification code.

8. Copy and paste your verification code into the box.

9. Click the **Verify** button.

   If you enter an incorrect verification code, the following warning is displayed:

   The Verification Code you entered is invalid. Please try again. Codes expire after 5 minutes and are 6 numbers long. If you make 4 incorrect attempts, your account will be locked for 4 minutes before you can sign in again.

Disabling Two Step Verification

The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it.
Please enable this in My Account before continuing.

To disable two step verification:

1. Select **My Account | Two Step Verification** to display the **Two Step Verification** page.


2. Select **No Two Step Verification** from the **Preferred method** drop-down.

3. Click the **Save** button.

   You will be signed out and will need to sign in again.

Consent History

This page displays a history of your agreements for the Local Authority to use your information in compliance with current data protection regulations.

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Consent History** to display the **Consent History** page.
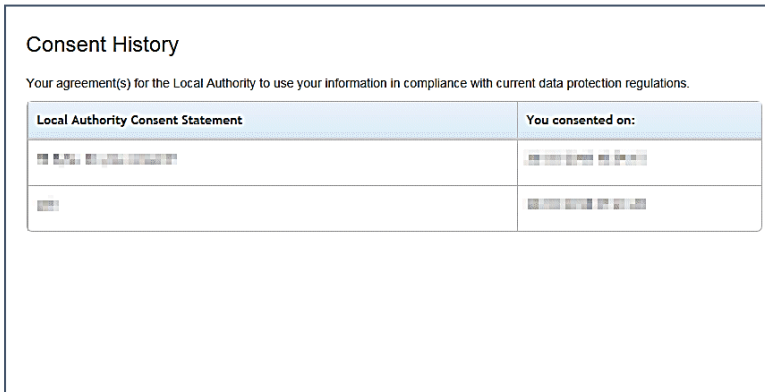

This is a read-only page.

Withdraw Consent

If you no longer wish the LA to use your information in the way described in its consent statement, you can review the current statement and start the withdrawal process. Once you have withdrawn your consent, you will no longer be able to access the portal from the account.

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Withdraw Consent** to display the **Withdraw Consent** page.
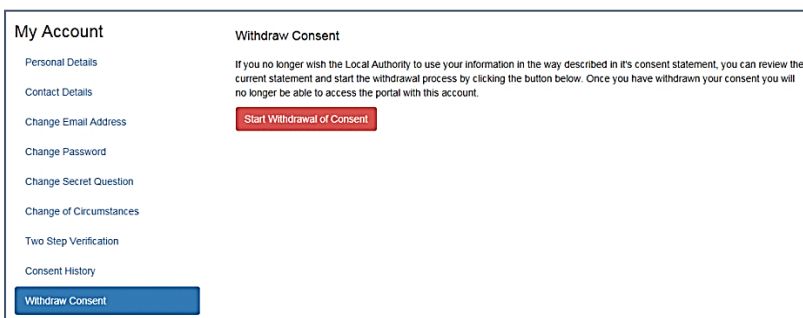
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.

5. The dialog displays the consent statement alongside the following message:

   You have previously agreed to the authority's most recent Data Protection Consent Statement.
   If you wish to withdraw your consent, click the withdraw button below.

6. Click the **Withdraw my consent** button to display the **Decline** dialog.

   This is a final warning that once you have withdrawn your consent for the LA to use your information, you will not be able to access your Citizen Portal account.

7. If you do wish to withdraw your consent, click the **Withdraw my consent** button. The following message is displayed:

You are now being logged out from your Citizen Portal account.

You can no longer use this Citizen Portal account. If you wish to use the Citizen Portal in future to access the authority's services, you will need to register again in the Citizen Portal.

8. Click the **OK** button. The Citizen Portal is closed.

Making Course Applications

This section describes the process used by a Citizen portal user to apply for a course.

The Citizen portal user can search the list of training manager courses and apply, view their active applications and application history. If they have any incomplete applications, they can access these and continue with their application from the last saved details. If the user has previously searched for a course and clicked the **View/Apply** button, this course is displayed when they next log in.

> **NOTE:** *A user can search for courses and view course details without being registered for the Citizen portal or logging in. If they wish to apply for a course they must log in with their registered email address and password.*
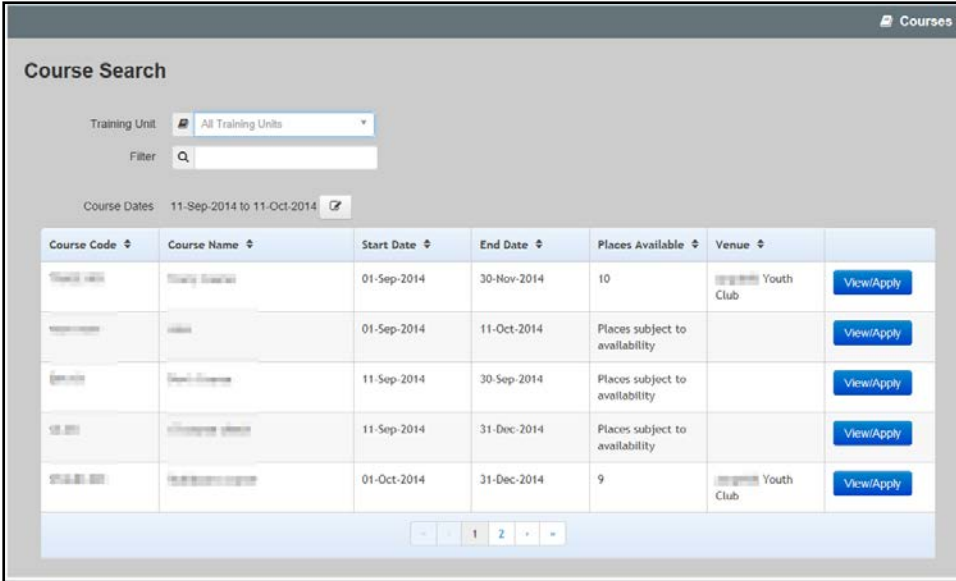
Searching for a Course

The Citizen portal user can search the list of Training Manager courses.

1. Select **Citizen Portal | Home | Courses** to display the Training Courses and Applications welcome page.
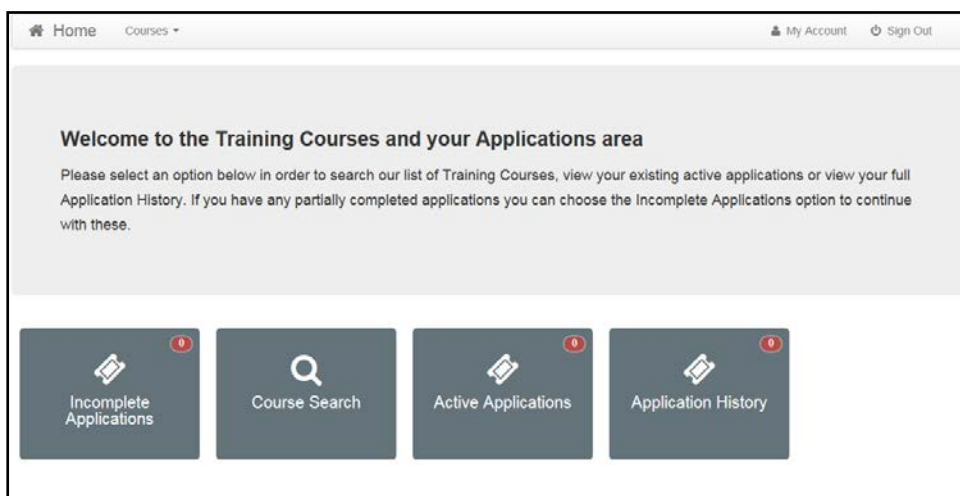
2. Click the **Course Search** button to display a list of all available courses for the selected **Course Dates**.

3. If required, select a **Training Unit** from the drop-down list.

    > *NOTE: The description of the Training Units displayed in the drop down reflects the **Training Unit Label on Portal** set up in Training Manager v4 via **Administration | Training Unit | Online Defaults**.*

4. If required, enter some text in the **Filter** to display course records where the **Course Name**, **Course Code** or **Venue** contains the filter text.

5. If required, click the select button to choose the **Course Dates** to be displayed.

    > *NOTE: The columns displayed in the search results depend on the device used, e.g. for a smartphone there will be a reduced number of columns and the remaining information will be presented differently.*
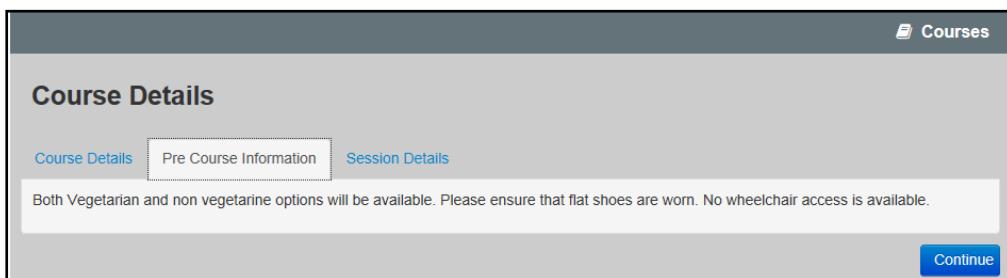
Viewing Course Details

1. Search for a course. For more information, see .

2. Click the **View/Apply** button to display the **Course Details** page.

    > *NOTE: The details displayed depend on the information populated for the course in Training Manager v4.*
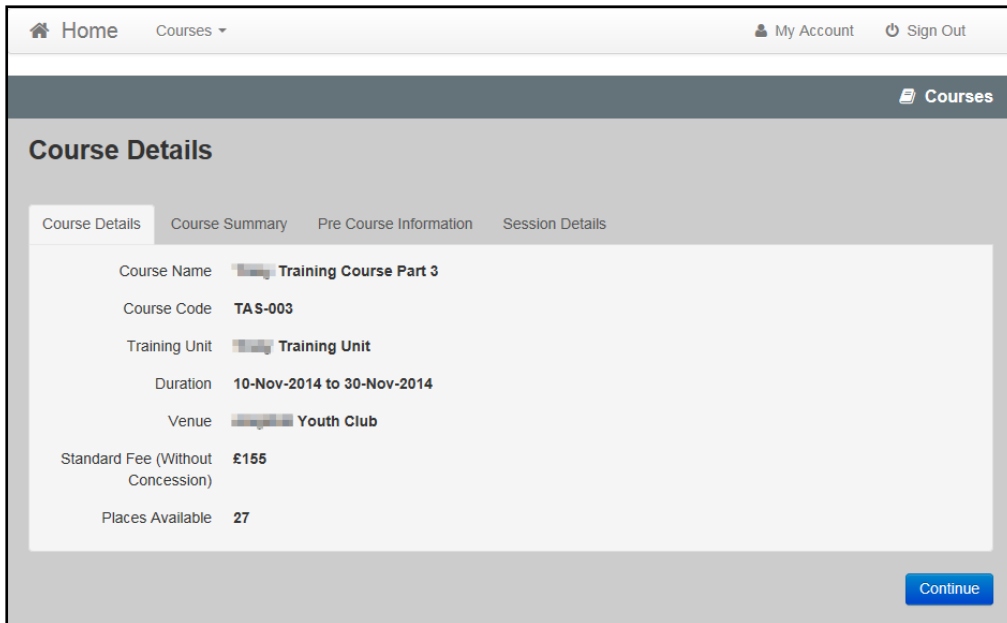
NOTE: *If the course is associated with a nominal ledger with a default fee greater than zero, the* ***Standard Fee (Without Concession)*** *is displayed. This does not include any discounts.*

3. If a narration memo has been defined, you can view it on the **Course Summary** tab.

4. If pre course information has been defined, you can view it via the **Pre Course Information** tab.

5. If session details have been defined you can view these via the **Session Details** tab.
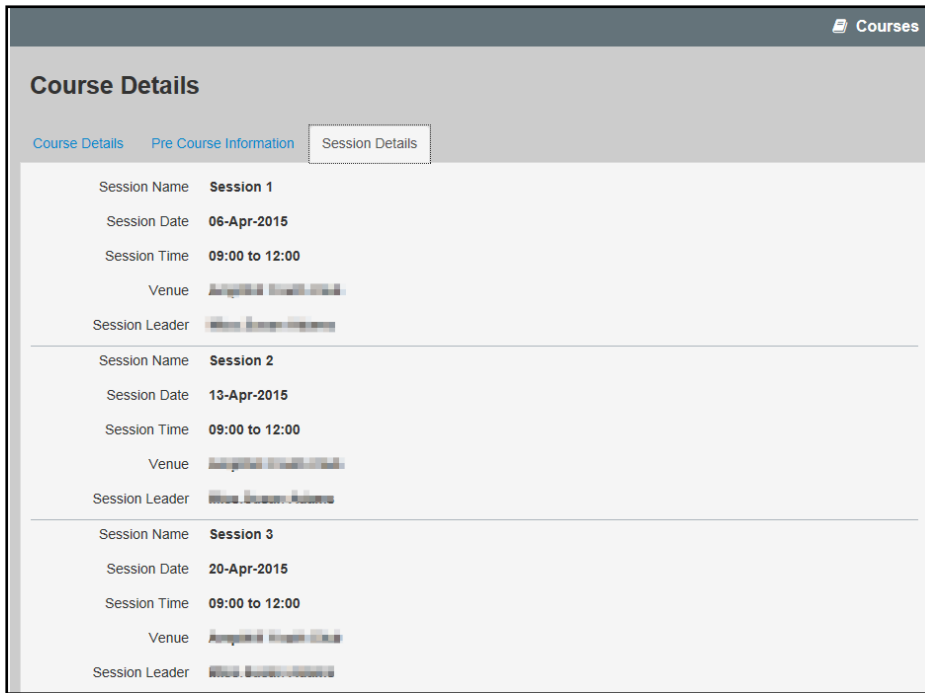
Applying for a Course

Before applying for a course, the Citizen portal user must have registered and be logged in.

> *NOTE: You may wish to enable colleagues working at the Local Authority to apply for courses and select the fees to be paid by a base set up to represent their LA department.*

1. Search for a course. For more information, see Searching for a Course *on page 33.*

2. Click the **View/Apply** button to display the **Course Details** page.
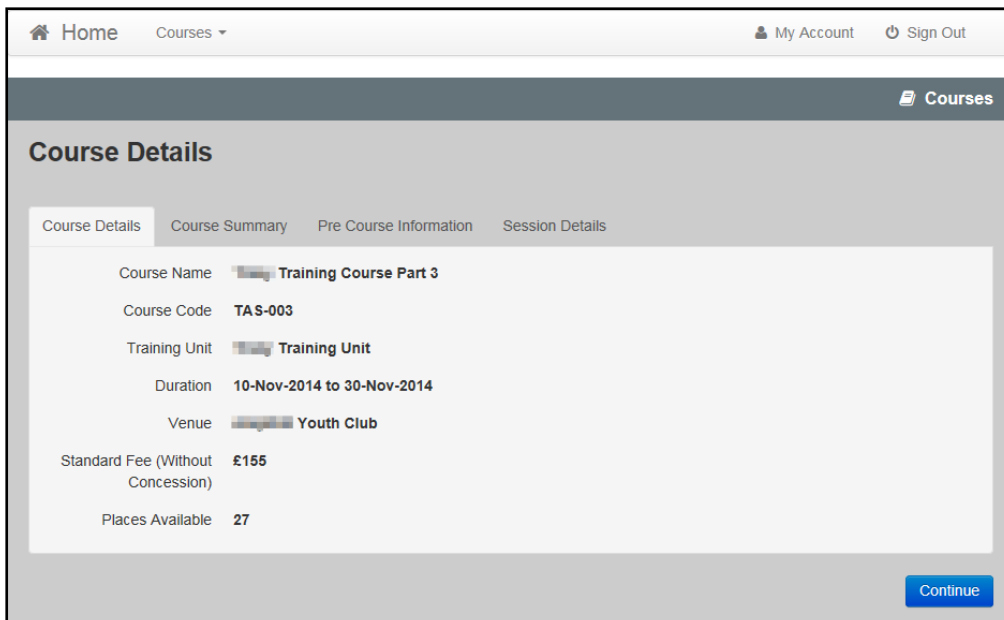
3. Click the **Continue** button to display the **Application Details** page.

4. If required, enter a **Post** or **Role**.

> *NOTE: Any additional questions that are defined for this course are displayed. Additional questions can be configured for a training unit via **Training Manager v4 | Administration | Training Unit | Additional Question**s.*
> *For more information, refer to the One Training Manager v4 handbook available on SupportNet and on the One Publications website.*

5. Click the **Continue** button. If the course is associated with a nominal ledger with a default fee greater than zero, the **Payment Details** page is displayed. If no **Payment Details** page is displayed, skip to step 9 to confirm the application.

6. Click the required button to select whether the course fee will be paid by **Self**, **School**, **Governing Body** or another **Organisation**.

> *NOTE: It is possible to amend the payment selection label, **School** to more accurately reflect the list of bases displayed.*
> *The payment selection is configurable via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources**.*

7. Depending on the option selected, select the required school, base governing body or organisation.

> **NOTE:** *If you select* **School**, *a list of bases is displayed. To be displayed in this list, the base must be defined as a Base Group in the Bases v4 module. The base group must also be selected as a* **Training Manager School** *base group on the* **Application Settings** *panel via* **Citizen Portal Admin | Administration | General Administration | Configure Portal Settings | Site Settings**.

8. Click the **Continue** button to display the **Confirm Application** page.
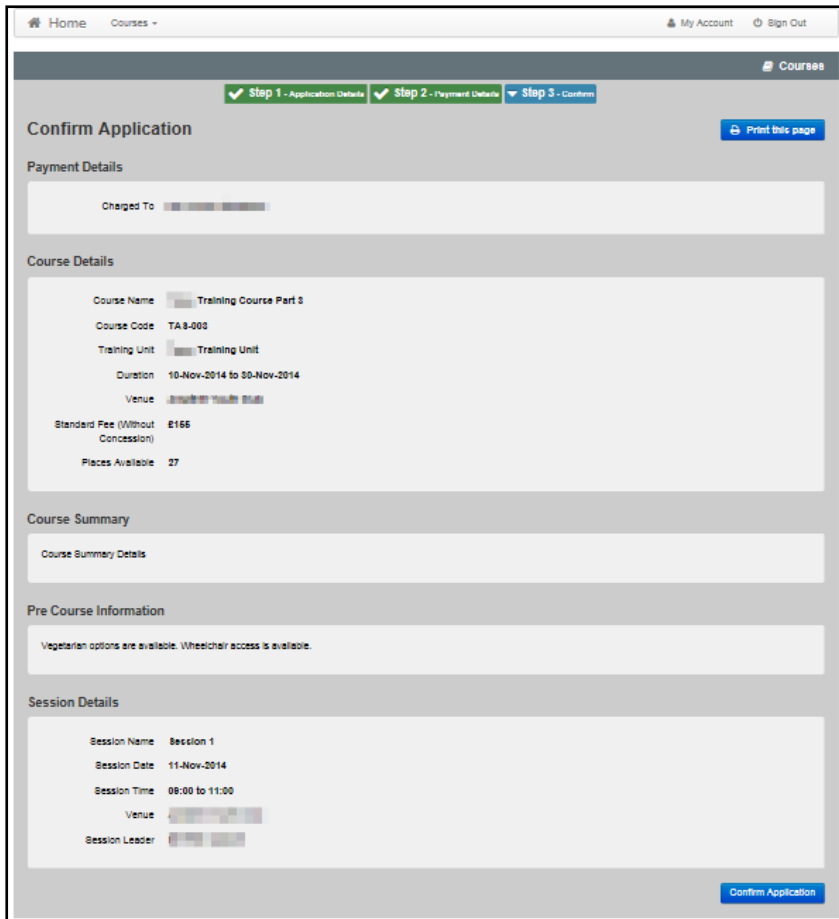
9. If required, click the **Print this Page** button to print the application details.

10. Click the **Confirm Application** button to save the application and send it to the Local Authority for processing. The application status is initially set to **Application Pending** and will be updated as the application is processed.
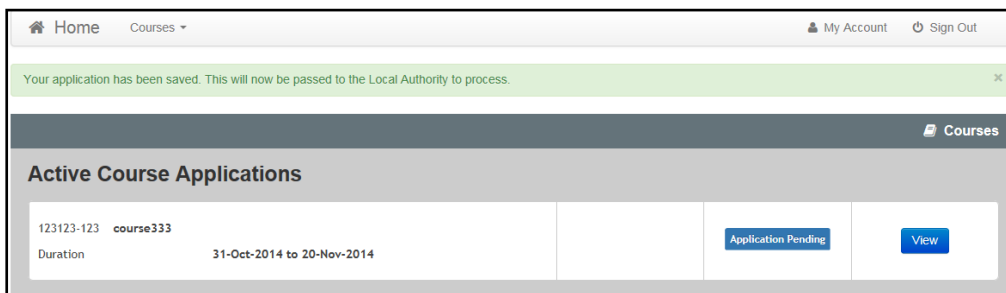

## Viewing Active Course Applications

If the Citizen portal user has any current applications that have been saved and sent to the Local Authority, the **Active Applications** button is enabled on the **Training Manager Welcome** page and the number of active applications is displayed. They can view the details of these applications.
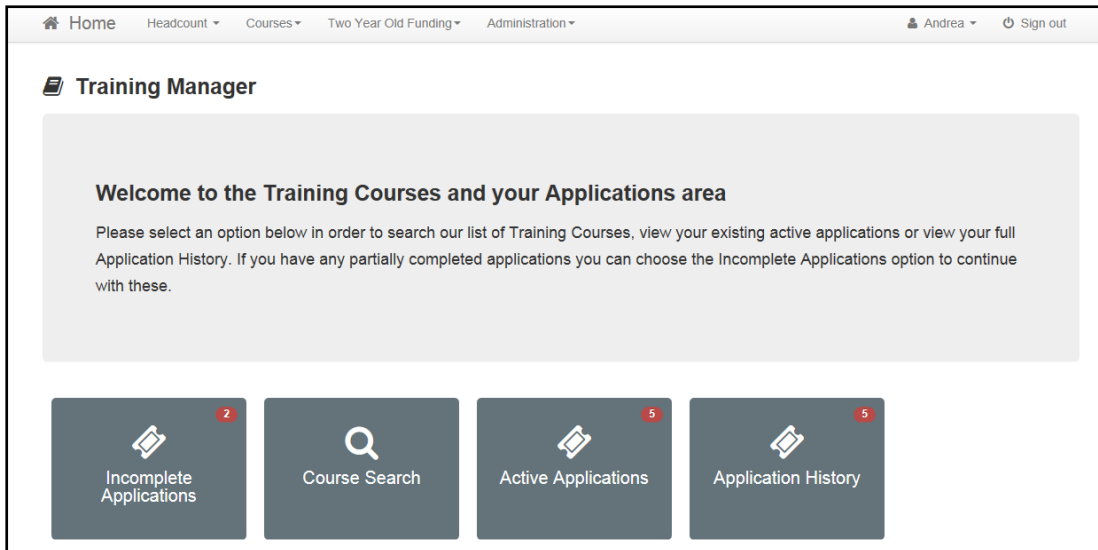
1. Click the **Active Applications** button to display the **Active Course Applications** page. Initially the status displays **Application Pending** and will be updated as the application is processed by the Local Authority.
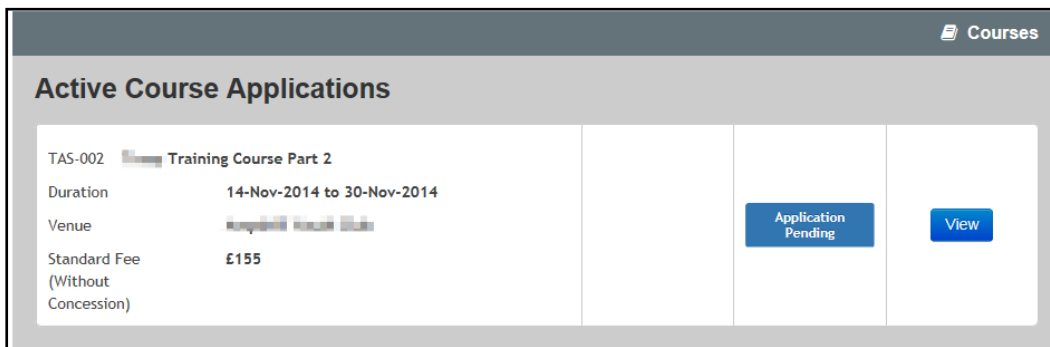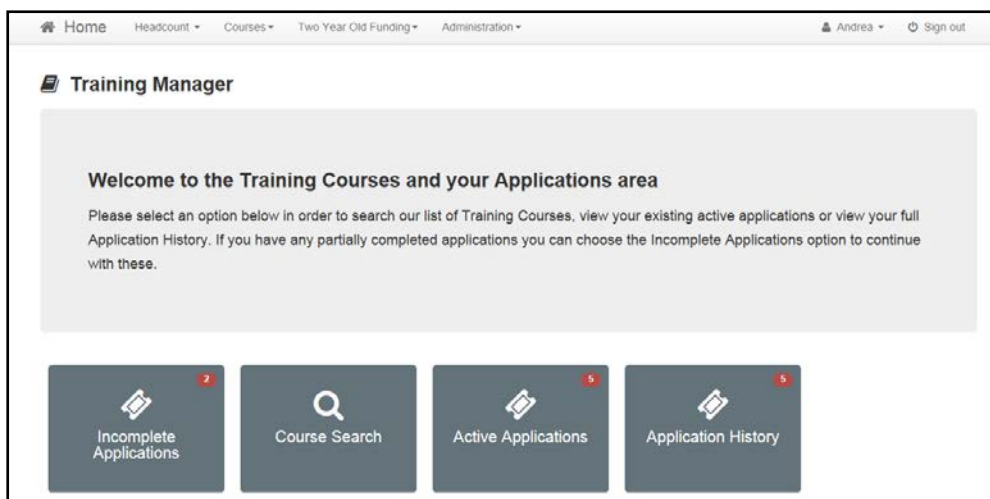

2. Click the **View** button to display the **Application Details** page.
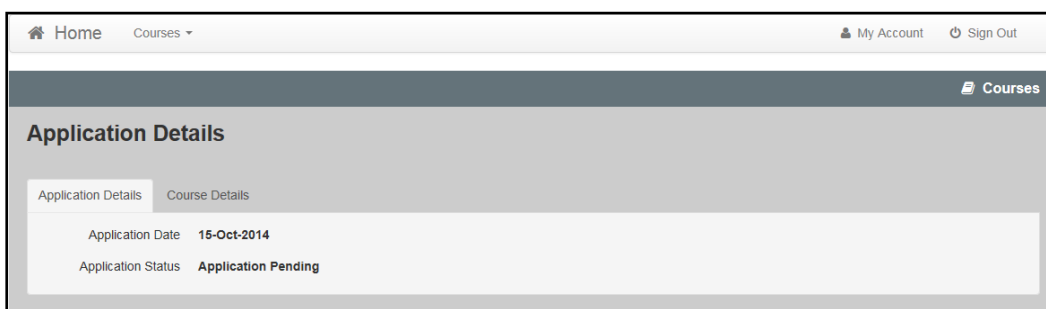
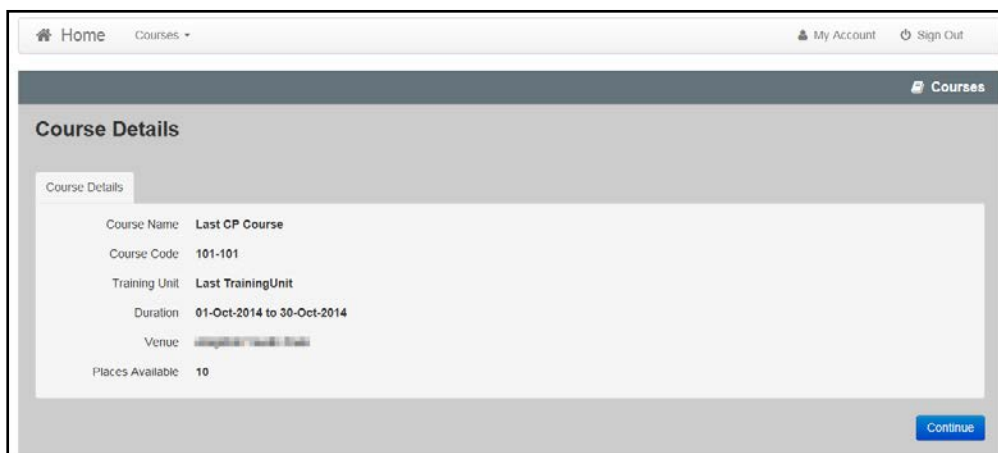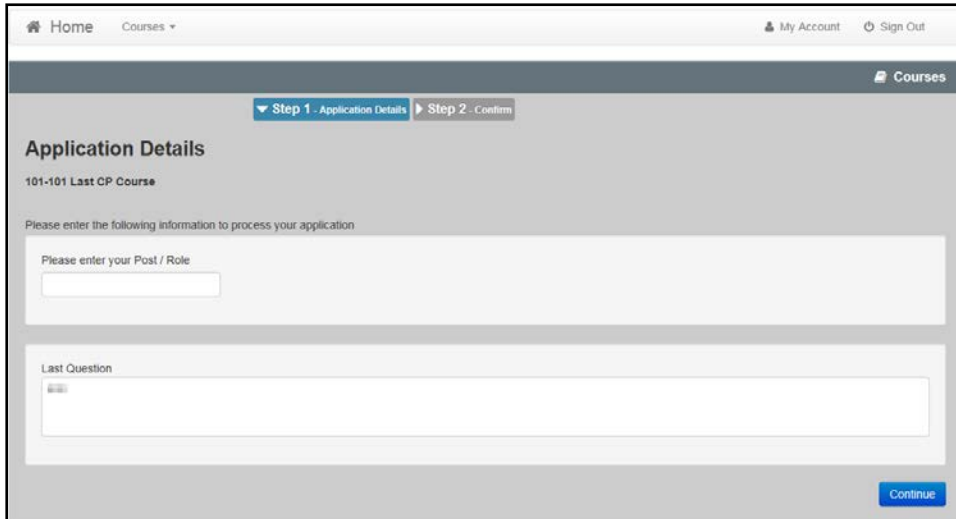# Continuing with an Incomplete Application

If there are any applications that have been started but not confirmed, the **Incomplete Applications** button is enabled on the **Training Manager Welcome** page and the number of incomplete applications is displayed.

1. Click the **Incomplete Applications** button to display the **Incomplete Applications** page.

2. Click the **Continue with application** button to display the **Course Details** page, which is pre-populated with the course details that were previously entered.
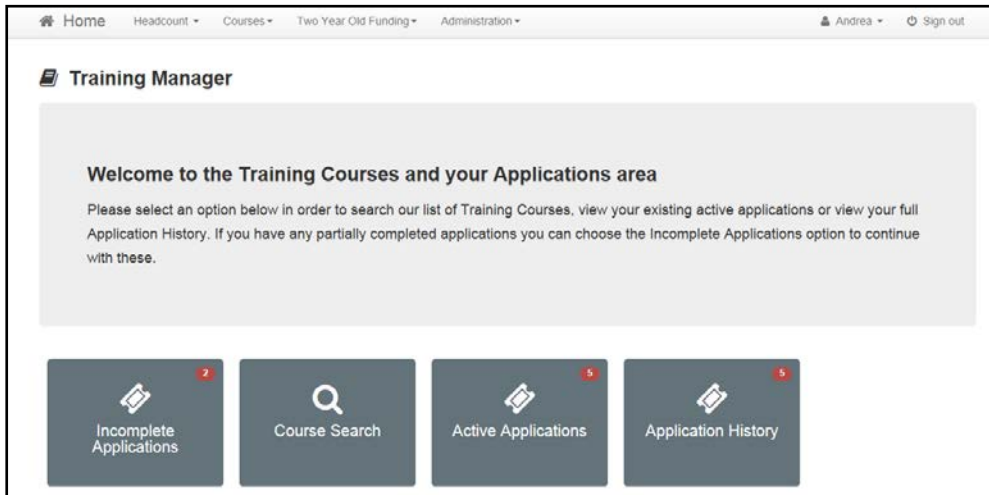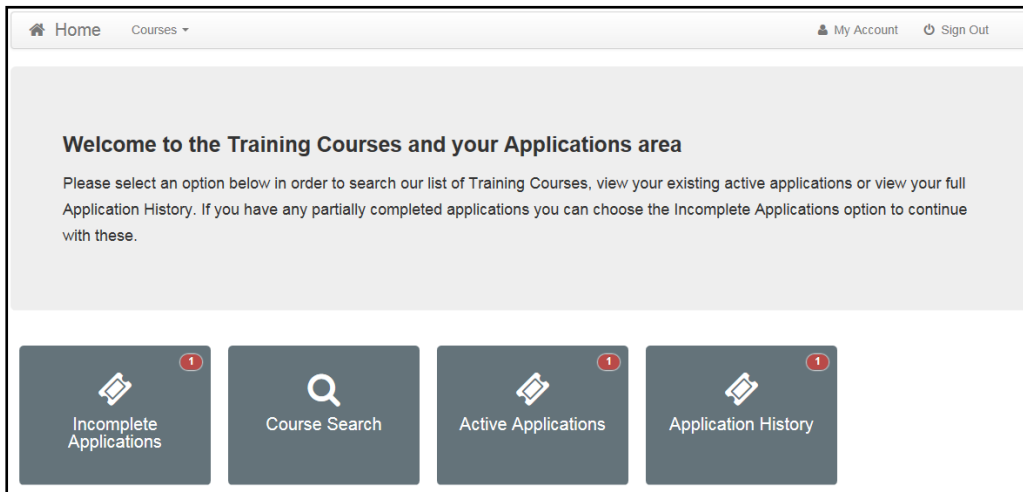

3. Click the **Continue** button to display the **Application Details** page and continue with the application.

Deleting an Incomplete Application

The **Incomplete Applications** button displays the number of applications that have been started but not confirmed. These applications can be deleted.

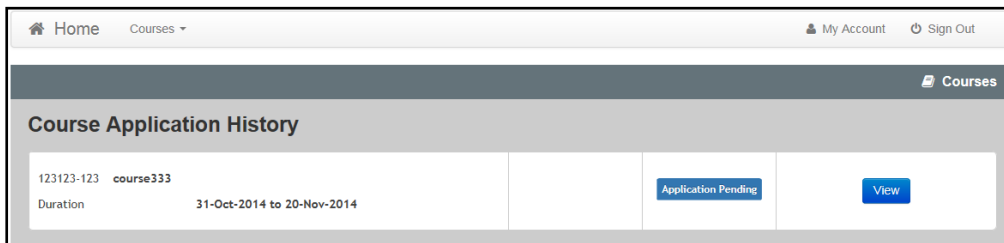1. Click the **Incomplete Applications** button to display the **Incomplete Applications** page.

2. Click the **Delete** button.

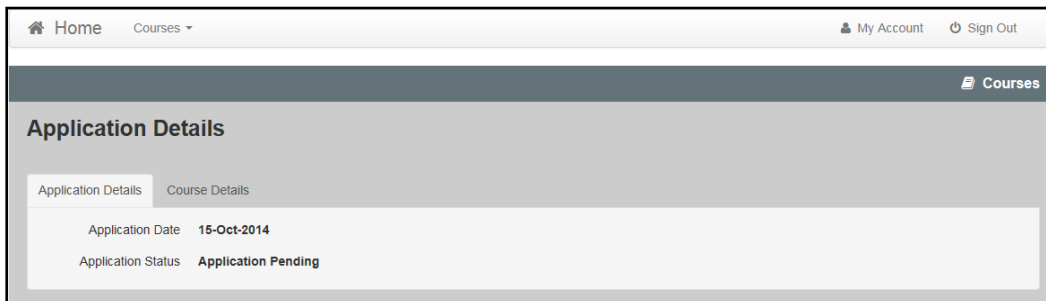# Viewing Course Application History

The Citizen portal user can view their course application history.

1. Click the **Application History** button to display the **Course Application History** page.

2. Click the **View** button to display the **Application Details** page.

Courses

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