oneeducation

One Training Manager Courses Provider Portal

last updated for the Spring 2017 release

Handbook

CAPITA

Revision History

Version	Published on
Spring 2017 (3.62) - 1.0	13/04/2017

Doc Ref

One Training Manager Courses Provider Portal Handbook/Spring 2017/2017-04-13

www.capita-one.co.uk

Contacting the Service Desk

You can log a call with the Service Desk 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 / Introduction to using Training Manager Online via the Provider Portal

Overview

Training Manager Online enables the Local Authority to publish a list of courses via both the One Citizen and the One Provider portals. School Administrators can use the One Provider portal to apply for courses for a member of staff, a governor or another individual linked to the school. The course applications are incorporated into the Local Authority's One database.

Using this Handbook

This handbook is intended for Local Authority Administrators. It describes the administration processes performed by the Local Authority and also provides an overview of the processes performed by the school-based member of staff.

> **More Information:**
> For information regarding configuring the portal, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities.*
> For information regarding using Training Manager v4 (Back Office), refer to the *One Training Manager v4* handbook.
> Both documents are available on My Account and on the One Publications website.

What's New in this Release

Two step verification has been added to the Provider portal to increase user security. For more information, see Setting Up Two Step Verification on page *9*.

02 | Administration and Site Setup

Before the Provider portal can be used to apply for training courses, the following setup is required:

- The System Administrator must record the licence key for Portal Training Manager via the v3 Client.

- The Local Authority Portal Administrator must configure portal settings via **Administration | Site Setup | Configuration**.

> *NOTE: The LA can choose to enable training course application facilities in Provider portal, Citizen portal or both.*
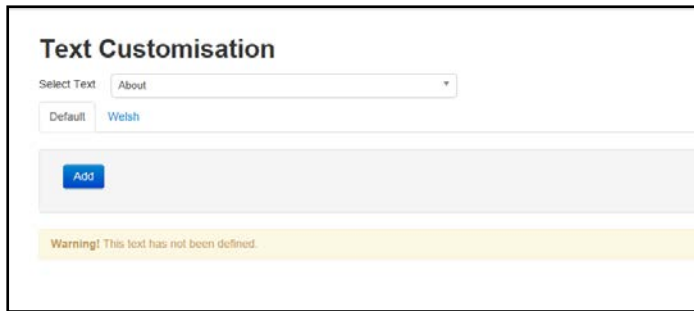
Customising Text

All text, field labels and messages that are displayed on the website can be configured.

Type	Name	Description
Site Notices	**Announcements and Welcome Text**	Displayed when the user logs into the portal.
	Guidance Text	Displayed on the **Home** page.
	About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Text is displayed when the user clicks the corresponding button at the bottom of each page.
Text Resources		Field labels, user messages and tooltips (text displayed when a user hovers the mouse over a field).
Email		Text for standard emails and messages relating to managing user accounts.
Message	Message Report Sent Body	Text for the message to be sent to a portal user when a new report is available to view. NB. Not used in Training Manager.
Site Titles	Site Title	Displayed at the top right-hand side of every page.

1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.
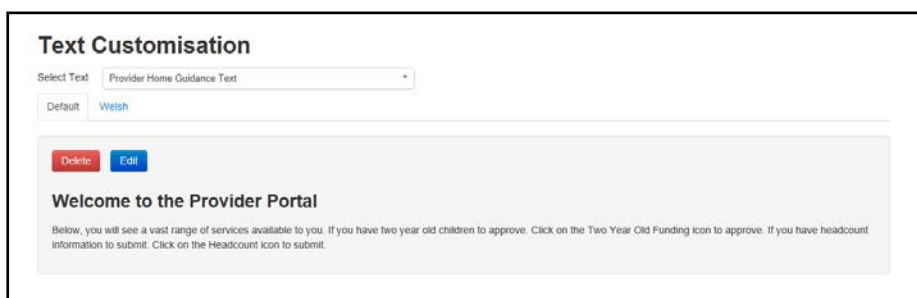
2. From the **Select Text** drop-down, select the type of text to be configured.

3. Select the **Default** or **Welsh** tab to determine the text language.
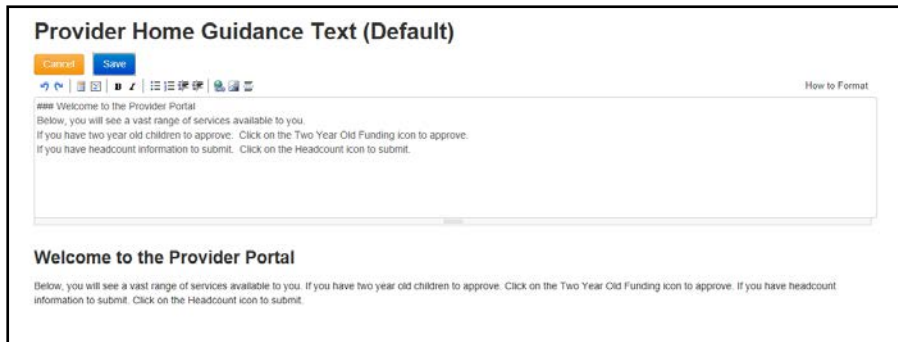
4. Click the **Add** button.
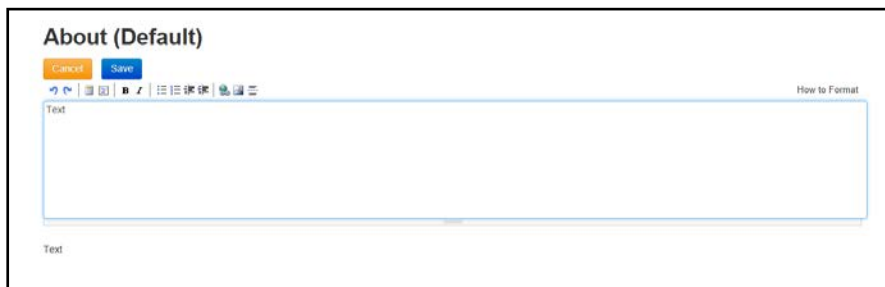
5. Enter required text in the formatting panel. Formatting buttons are provided above the panel.

   The formatted text is displayed beneath.

6. Click the **Save** button.

Editing text

1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.

2. From the **Select Text** drop-down, select the type of text to be configured.

3. Select the **Default** or **Welsh** tab to determine the text language.

4. Click the **Edit** button.

5. Make the required changes to the text displayed in the formatting panel. Formatting buttons are provided above the panel.

   The amended text is displayed beneath.

6. Click the **Save** button.

Customising the Site Logo

A new site logo can be uploaded to be displayed on the website.

> **NOTE:** *The following restrictions apply to the image:*
> *Image type must be png, jpg, jpeg, gif or bmp.*
> *File size must be less than 1000000 bytes (1MB).*
> *Image dimensions cannot be greater than 1170 pixels (width) by 400 pixels (height).*

1. Select **Administration | Site Setup | Customise Site Logo**.

2. Click the **Upload** button.
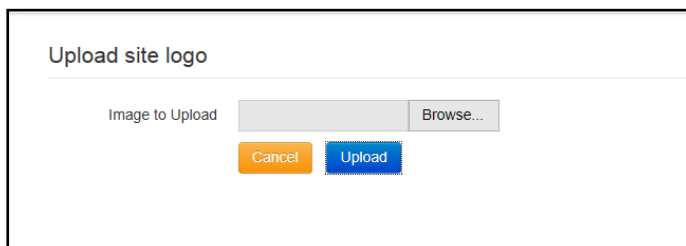
3. Click the **Browse** button to select an image.

4. Click the **Upload** button.

Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to:
https://support.google.com/chrome/answer/95416?hl=en-GB

Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the **Home** button to display the **Home** page
Change Password	Click the drop-down adjacent to the user name and select **Change Password.** Enter your **Current password**, **New password** and **Confirm new password**. Click the **Change password** button**.**
Change Secret Question	Click the drop-down adjacent to the user name and select **Change Secret Question.** Enter your **Current Password**, Select a **New Secret Question** and enter a **Secret Answer**. Click the **Save** button. **NOTE:** This functionality is only available if second factor authentication is enabled.
Sign out	Click the **Sign Out** button adjacent to the user name.

03 | Managing Users

The One System Administrator must ensure that the user is associated with a user group and that appropriate permissions have been granted to that group. This is achieved via **v4 Client | Tools | Permissions | User Group Processes.**

1. Select a **User Group**.

2. Select the **Main Business Process** of **Provider Portal**.

3. Grant access to the **Business Process** of **Training**.

> **More Information:**
> For more information regarding permissions, refer to the Reference Guide: *RG_Permissions_User Group Processes*, which is available on the One Publications website and on <u>My Account</u>.

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Accounts**.

2. Send the log in details (user name and initial password) to the new user via email.

Activating a Portal User Account

A new Provider portal user needs to activate their user account.

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they <u>must</u> click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.

2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

> **More Information:**
> For more information regarding user setup and permissions, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on <u>My Account</u> and on the One Publications website.

Logging into the Portal

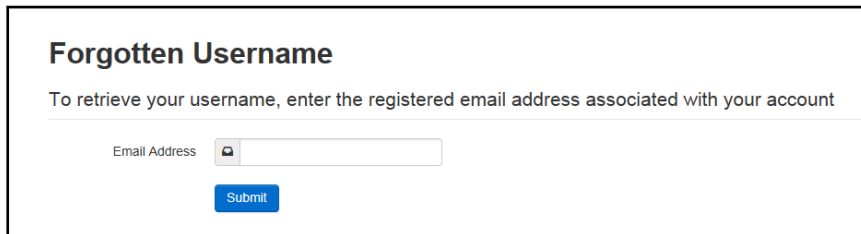A user with an active user account can log into the portal.
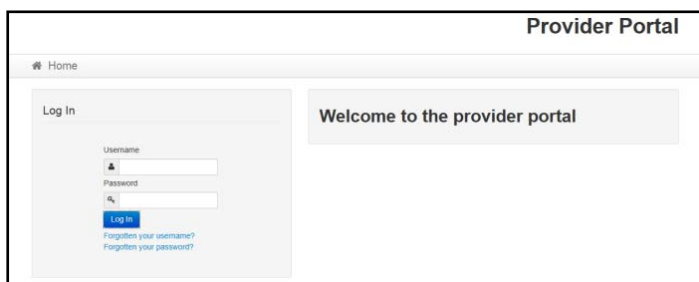
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.

Retrieving Your User Name

If you forget your user name:

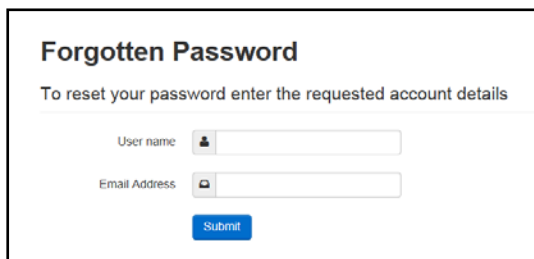1. From the portal **Log In** screen, click the **Forgotten your username?** link to display the **Forgotten Username** page.

2. Enter your registered **Email Address** and click the **Submit** button.

3. Access your registered email account and open the email received to retrieve your user name.
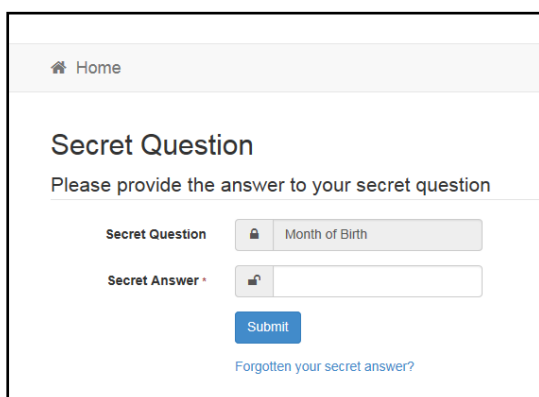
Resetting Your Portal Password

To reset your password:

1. From the portal **Log In** screen, click the **Forgotten your password?** link to display the **Forgotten Password** page.

2. Enter your **User name** and registered **Email Address** and click the **Submit** button.

3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.
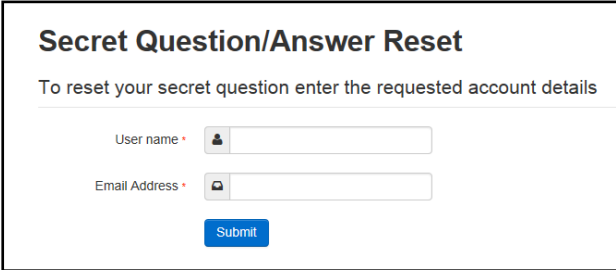

4. Access your registered email account and open the email received.

5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

If you need to reset your secret question:

1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.

Secret Question/Answer Reset

To reset your secret question enter the requested account details

User name *

Email Address *

Submit

2. Enter your **User name** and registered **Email Address** and click the **Submit** button.

3. Follow the reset instructions in the email.

Setting Up Two Step Verification

Introduction
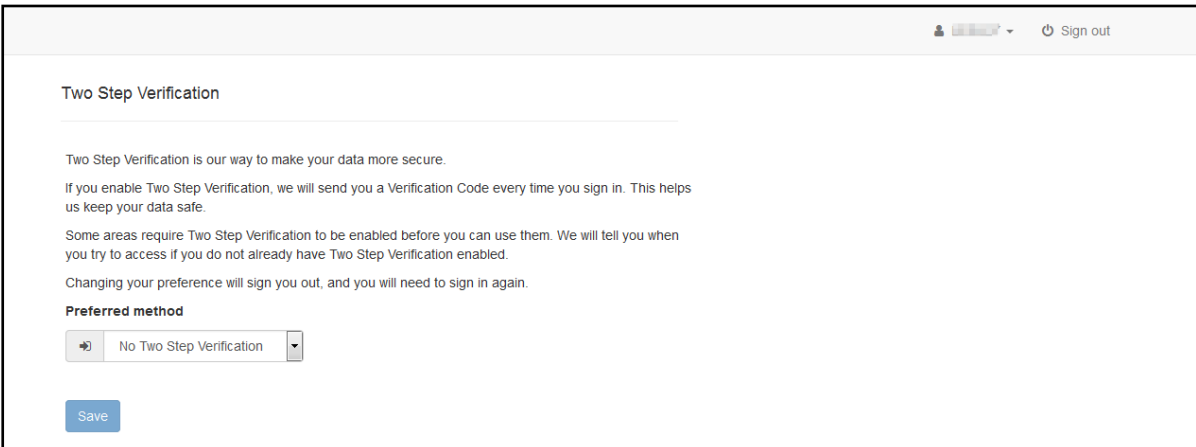
If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

♟ ⏷ Sign out

Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

Preferred method

→] No Two Step Verification ▾

Save

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

3. Click the **Save** button.

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

Managing Users

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

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.

04 | Home page

Provider Portal Home Page

Introduction

When the portal administrator or user logs into the Provider portal, any announcements regarding the portal are displayed. The user clicks the **Continue** button to display the **Home** page.

> *NOTE: Announcements are configured via **Administration | Site Setup | Text Customisation**.*

The **Home** page displays the **Site Logo** and guidance text set up via **Administration | Site Setup**.

> *NOTE: The facility to change your password or secret question is accessed by clicking the drop-down adjacent to your user name.*

Navigating within the Provider Portal

The services to which you have access are indicated by the buttons displayed on the **Provider Portal** home page. There are drop-down menus displayed at the top of each page which enable you to navigate to other pages.
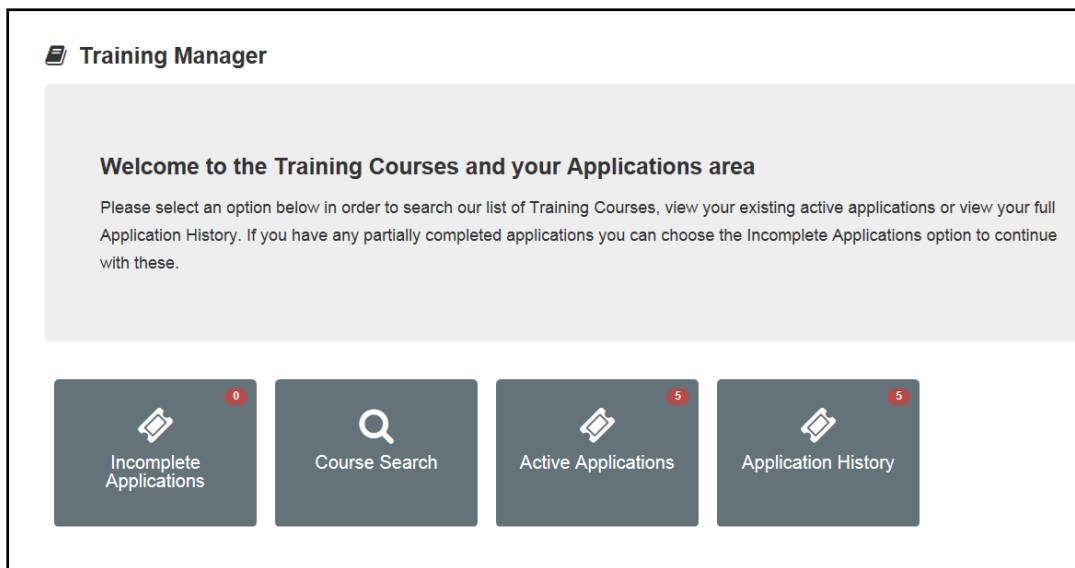
Applying for a Course

This section describes the process used by a school-based user to apply for courses for themselves or on behalf of other people linked to their school.

The **Courses** button is displayed on the **Provider Portal** home page if:

- The System Administrator has recorded the licence key for Portal Training Manager.

- The Portal Administrator has configured the portal settings. For more information, see .

- A user account has been set up. For more information, see .

When the user clicks the **Courses** button on the **Provider Portal** home page, the **Training Manager Welcome** page is displayed.

The user can search for a course, view their existing applications, complete any incomplete applications and view their application history. The number of applications that the user currently has is displayed on the corresponding button.

Confirmed applications are submitted to Training Manager v4 (Back Office) and displayed on the **Applications | Incoming Applications** tab.

> **More Information:**
> For information on using Training Manager v4 (Back Office), refer to the *One Training Manager v4* handbook available on My Account and on the One Publications website (http://www.onepublications.com).

Selecting a Course

1. Click the **Course Search** button to display a list of all available courses for the specified dates.

> *NOTE: Courses are only displayed in the Provider portal if they are set up to be published on the portal. This is managed in **Training Manager v4** via the **Courses** area. On the **Courses | Basic Details** page the **Publish on Web** check box must be selected. On the **Courses | Additional Details** page the **Provider Portal** must be listed in the **Publish on Portal(s)** panel.*

2. If required, select a **Training Unit** to filter the list.

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

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

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

5. Select a course from the list.

6. 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.
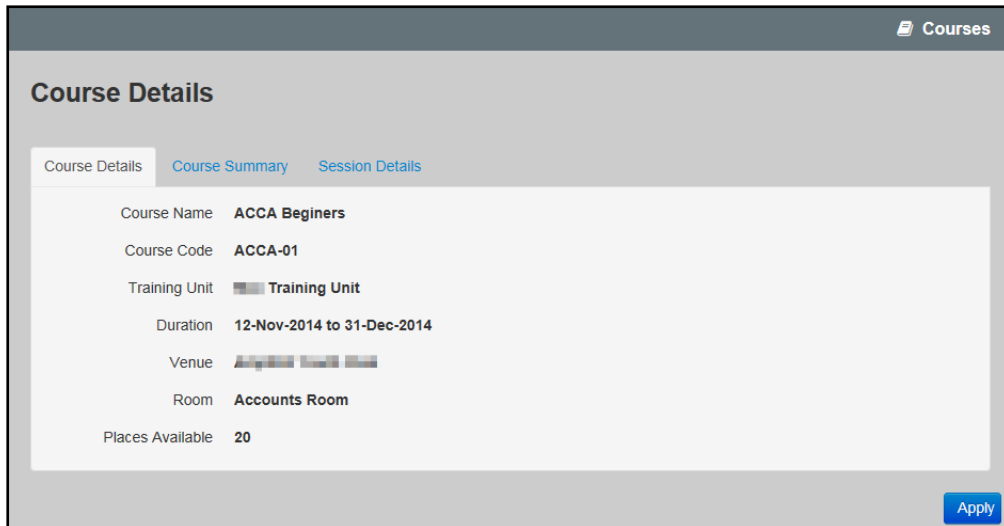
If a **Course Narration** memo has been defined, you can view this on the **Course Summary** tab.

If pre course information has been defined, you can view it via the **Pre Course Information** tab.
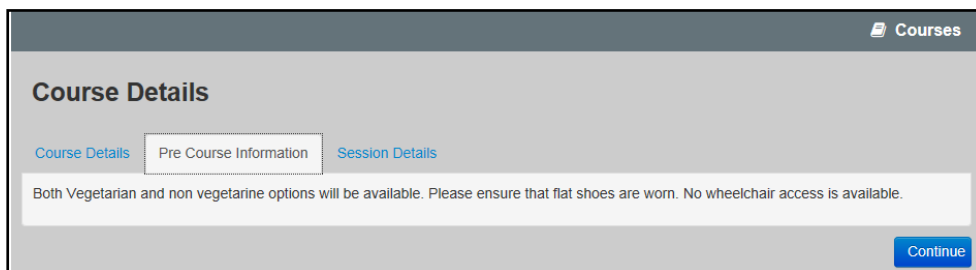
If session details have been defined you can view these via the **Session Details** tab.
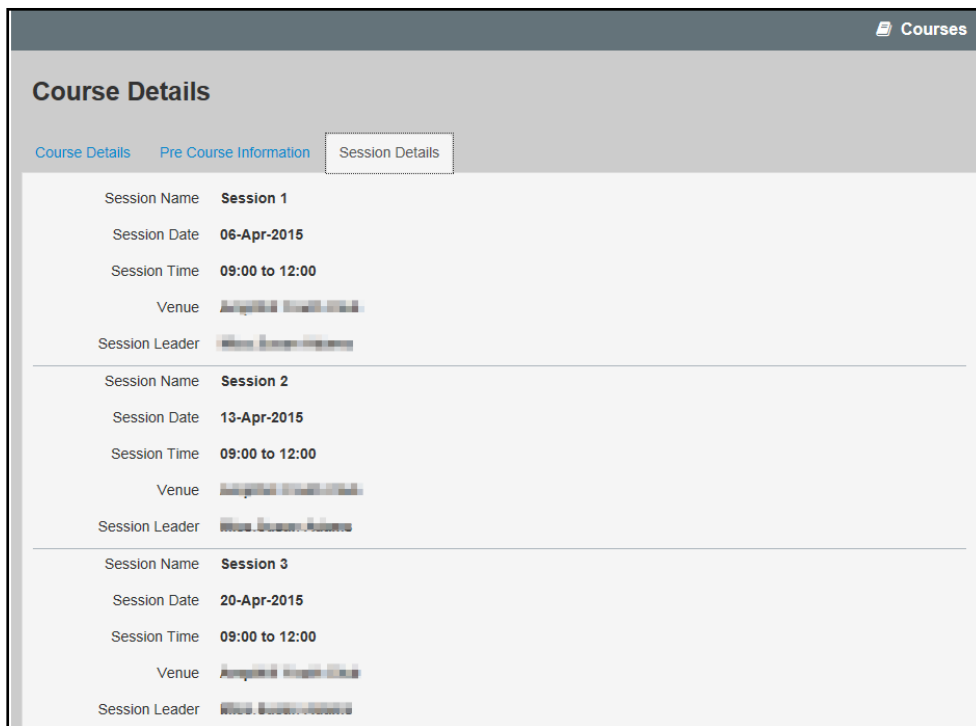
7. Click the **Continue** button to display the **Application Details** page.

On the **Application Details** page you can add an applicant (named person) or make reservations for as yet unnamed applicants, for the selected course.

Adding an Applicant to a Course

1. Select the course to which you want to add an applicant. For more information, see Selecting a Course on page 12.

2. Click the **Add Applicant** button to display the **Add Application** page.

3. Enter the **Personal Details** of the applicant.

4. Enter the **Application Details**.

> **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. They can also be configured for a template or a course.*
> *For more information, refer to the One Training Manager v4 handbook available on My Account and on the One Publications website (http://www.onepublications.com).*

5. If required, select the **Payment Details**.

> **NOTE:** *If your mapped base is linked to a Governing Body, you can select whether the course fees will be paid by the Base or the Governing Body. If your Local Authority is not using the Governors module, or if the mapped base is not linked to a Governing Body, the course fees are automatically assigned to the base, and the **Payment Details** panel is not displayed.*

Making a Reservation for a Course

To reserve places on a course:

1. Select the course to which you want to add an applicant. For more information, see Selecting a Course on page 12.

2. Select the number of reservations to be created and click the **Add Reservation** button.

3. Click the **Continue** button to display the **Confirm Application** page.

The **Confirm Application** page displays **Personal Details**, **Application Details** and **Payment Details** for each applicant, followed by the **Payment Details** for each reservation.

Following the applicant details, the **Course Details**, **Pre Course Information**, **Course Summary** and any **Session Details** defined for the course are displayed.
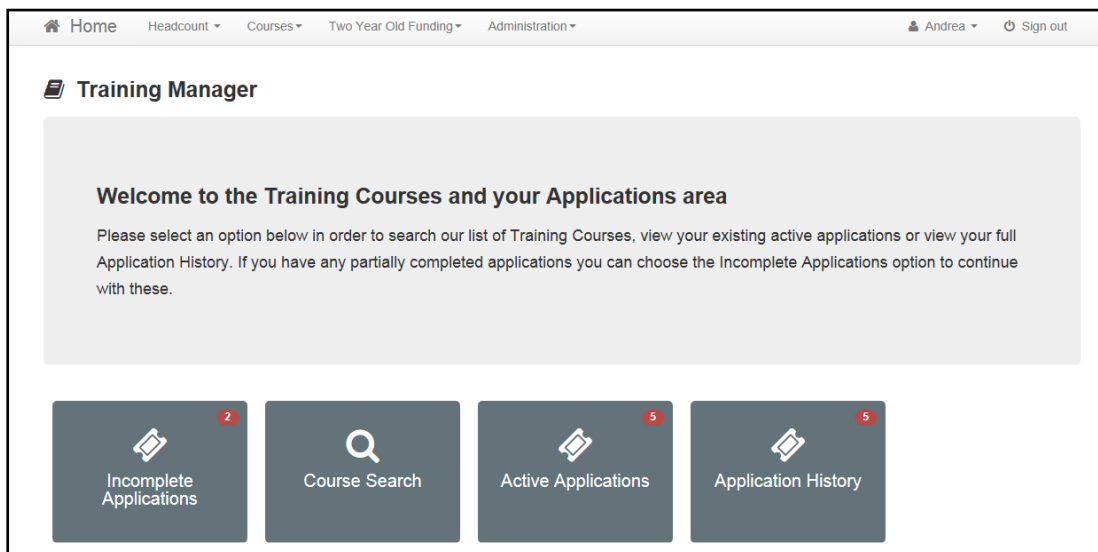
Session Name	**Session 21**
Session Date	**24-Aug-2015**
Session Time	**09:00 to 12:00**
Venue	███████
Session Leader	███████
Session Name	**Session 22**
Session Date	**31-Aug-2015**
Session Time	**09:00 to 12:00**
Venue	███████
Session Leader	███████

Confirm Application
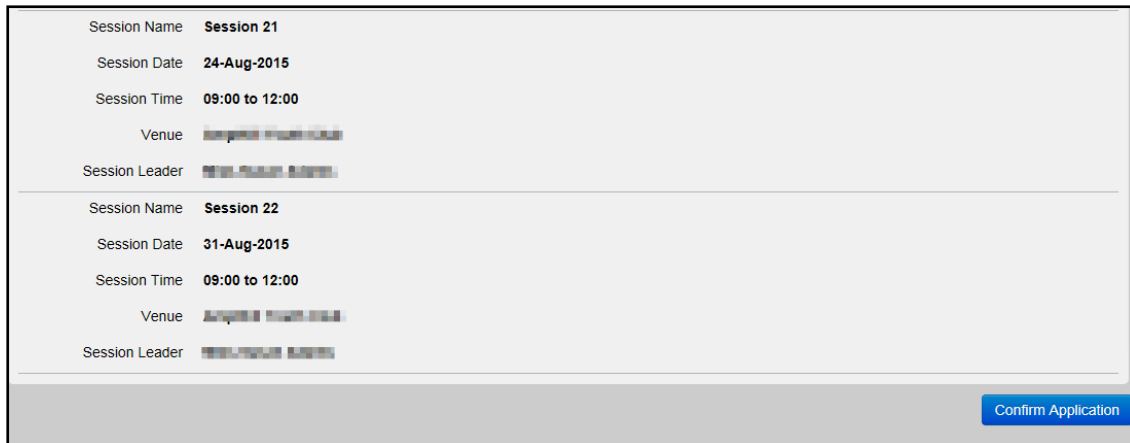
4. Click the **Confirm Application** button.

Viewing Active Course Applications

Once an application or reservation has been made for a course, it is moved from the **Course Search** area to the **Active Applications** area. To add new applicants or reservations to the course, you need to select it from this area.

All current and planned (pending) applications linked to the base can be viewed. Pending applications can be removed and new applicants can be added.

The number of **Active Applications** that you currently have is displayed on the button.

☆ Home Headcount ▾ Courses ▾ Two Year Old Funding ▾ Administration ▾   **👤 Andrea ▾   ⏻ Sign out**

📖 Training Manager

Welcome to the Training Courses and your Applications area

Please select an option below in order to search our list of Training Courses, view your existing active applications or view your full Application History. If you have any partially completed applications you can choose the Incomplete Applications option to continue with these.

Incomplete Applications [2]	Course Search	Active Applications [5]	Application History [5]

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.

Removing a Pending Application

1. Click the **Active Applications** button to display the **Active Course Applications** page.

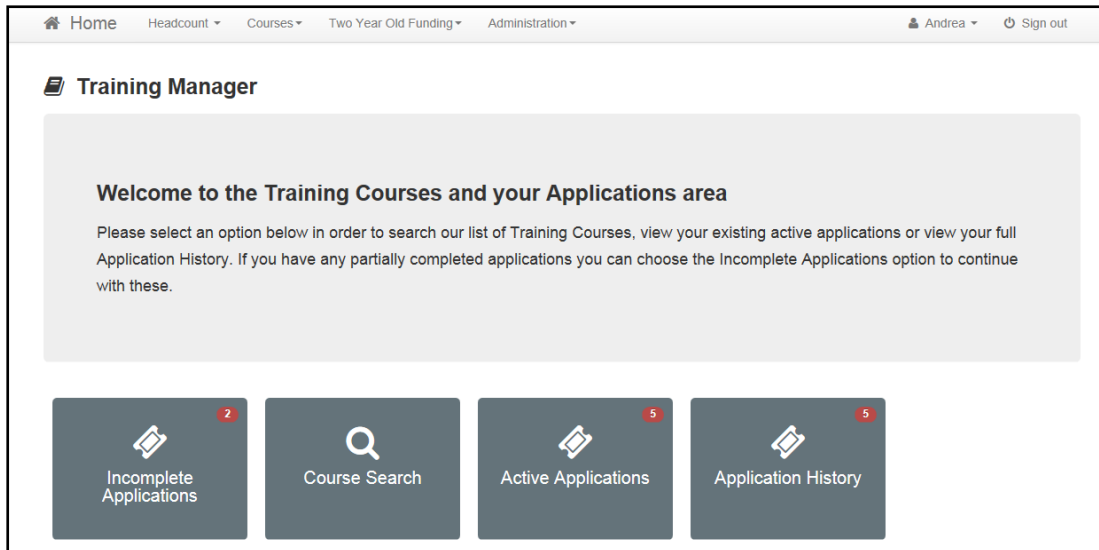2. Click the **View** button for a pending application to display the **Application Details** page.
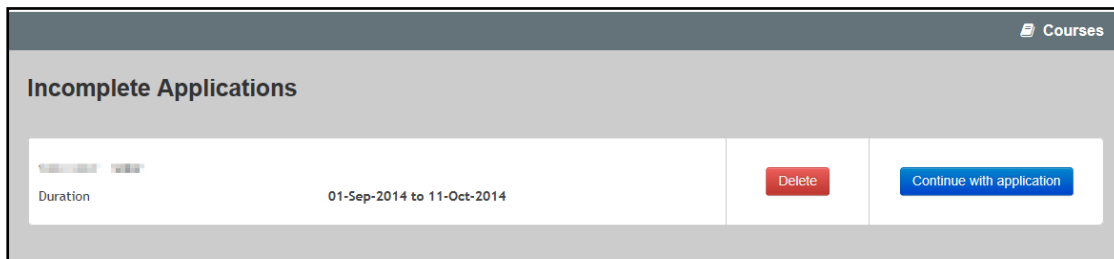

3. Click the **Remove** button.

Processing Incomplete Applications

The **Incomplete Applications** button is displayed on the **Training Manager Welcome** page. The number of incomplete applications is that you currently have is displayed on the button.
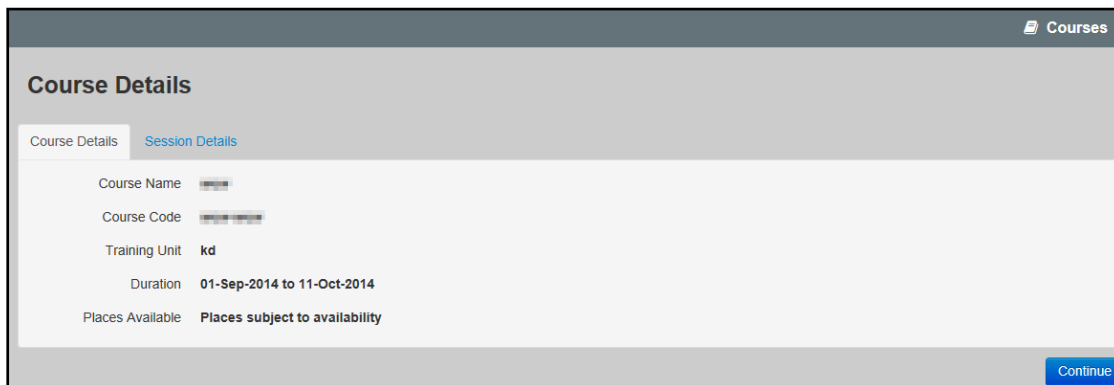
Continuing with an Incomplete Application

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 continue with this application.
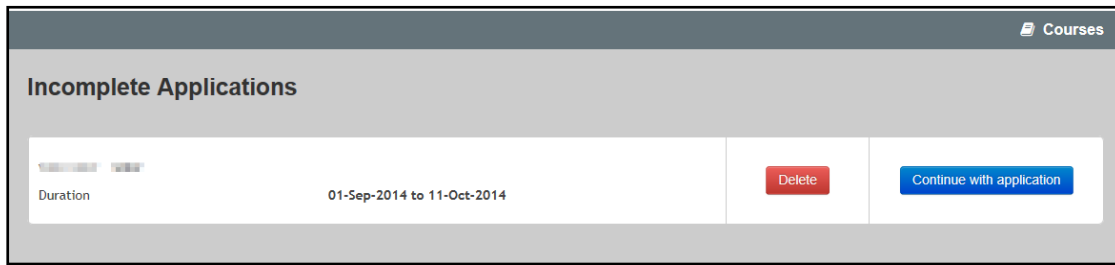
> **More Information:**
> Adding an Applicant to a Course *on page 15*
> Making a Reservation for a Course *on page 16*
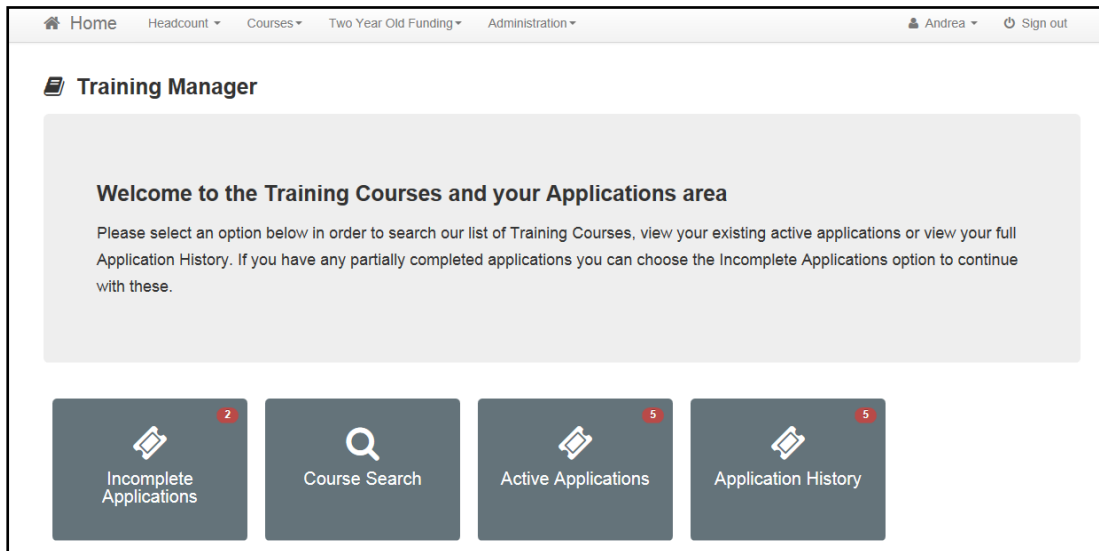
Deleting an Incomplete Application

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

2. Click the **Delete** button.

Viewing Application History

The **Application History** button is displayed on the **Training Manager Welcome** page. The number of historical course applications that you have made is displayed on the button.

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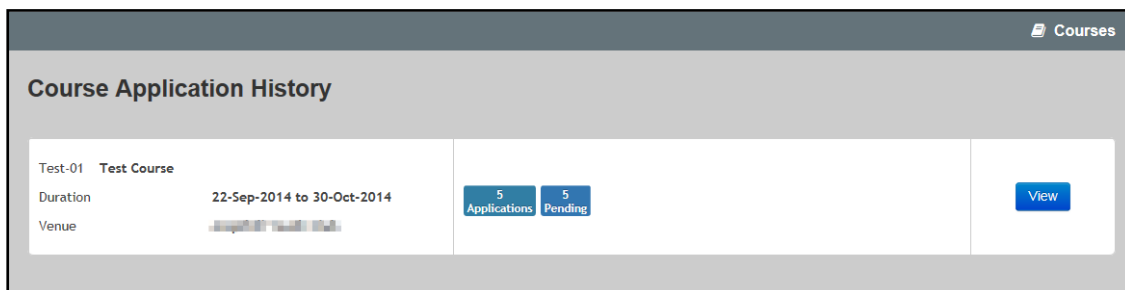
2. Click the **View** button to display the **Application Details** page.

Test-01   Test Course   📖 **Courses**

Application Details

| Applicants Details | Application Details | Course Details | Session Details |

Create an application with applicant details   [Add Applicant]

Please select count of reservation(s) you wish to create   [1 ▾]   [Add Reservation]

| **Application Pending**
Reservation
Charged To   Base

[Remove] | **Application Pending**
Reservation
Charged To   Base

[Remove] | **Application Pending**
Reservation
Charged To   Base

[Remove] | **Application Pending**
Reservation
Charged To   Base

[Remove] |

Application Pending
Reservation
Charged To   Base

[Remove]

Home page

Index