# oneeducation

## School Admissions Portal (Northern Ireland)

last updated for the Autumn 2019 (3.70) release

Handbook

# CAPITA

# Revision History

## Copyright

School Admissions Portal Handbook/Autumn 2019 (3.70)/08-11-2019

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## 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* | Document Change Control

| Date | Release | Description |
|---|---|---|
| **Autumn 2019** | **3.70** | **ATF Download** is available on the landing page of School Admissions. This functionality allows Schools to download the file from the School Admission Portal sent from their local authority.<br><br>*See link below for more information*<br><br>• *ATF Download* on page *15*<br><br>*See the following for more information on ATF*<br><br>• *Admissions Transfer File* on page *15*<br>• *ATF Permission* on page *16*<br>• *System defaults* on page *17* |
| **Apr 2019** | **3.68** | No changes have been made to the functionality of the School Admissions Portal. However, some screen prints and text have been updated to reflect the latest version of the software. |

# *02* | **Introduction**

## Overview

The School Admissions portal enables you to perform the following tasks:

- View a list of applications made to your school for a selected transfer group.

- Respond to applications made to your school; verify application, address and sibling.

## Using this Handbook

This handbook is intended for administrators at the Education Authority and schools. It describes the administration tasks performed by the Education Authority, as well as the processes performed by the school itself.

This document is split into four sections:

- **Introduction**

- **Managing Your User Account** – covers account activation and housekeeping.

- **Configuration** – covers the Provider Portal's text configuration, portal setup and user account review features.

- **Using the School Admissions Portal** – covers the specific School Admissions Portal features – viewing applications, applications and leavers, editing ranks, and verifying claimed siblings.

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**More Information:**

For information regarding using Portal Back Office, refer to *One Portal Back Office* handbook.

For information regarding configuring the Provider Portal, refer to the *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide.

Both documents are available from the One Publications website.

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## 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. |
| Enable Two Step Verification | Click the drop-down adjacent to the user name and select **Two Step Verification**. Select **Email** from the **Preferred method** drop-down. Click the **Save** button. You will be signed out and will need to sign in again. |
| Disable Two Step Verification | Click the drop-down adjacent to the user name and select **Two Step Verification**. Select **No Two Step Verification** from the **Preferred method** drop-down. Click the **Save** button. You will be signed out and will need to sign in again. |
| Sign out | Click the **Sign Out** button adjacent to the user name. |

# *03* | Managing Your User Account

## 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 [My Account](#).

## Logging into the Portal

A user with an active user account can log into the portal.
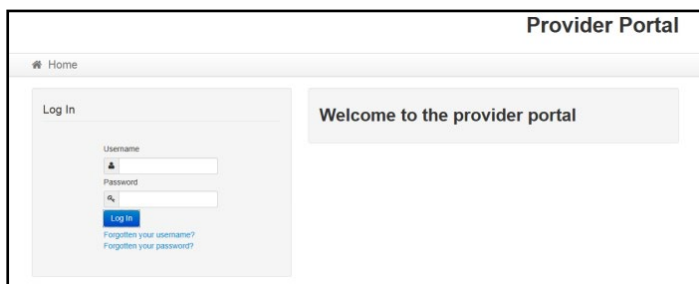


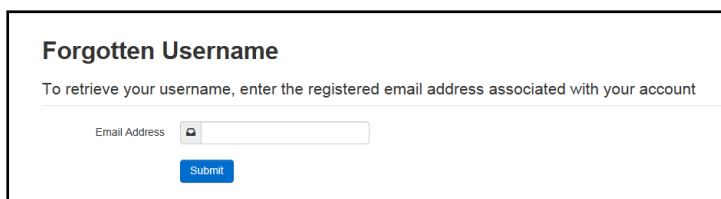Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

> **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.

**Forgotten Username**

To retrieve your username, enter the registered email address associated with your account
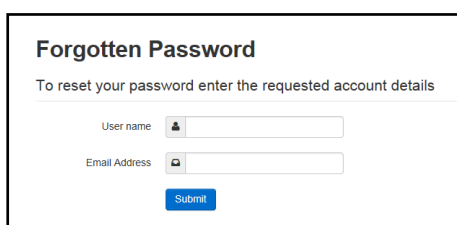
Email Address

Submit

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

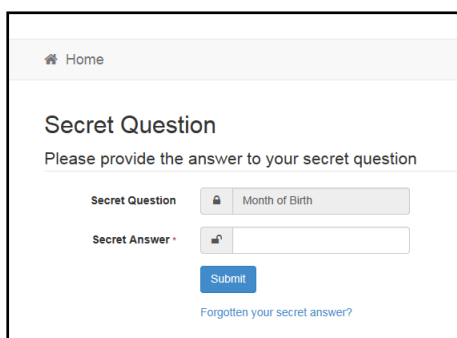3. Access your registered email account and open the email received to retrieve your user name.

# 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.

**Forgotten Password**

To reset your password 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. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.

🏠 Home

Secret Question

Please provide the answer to your secret question

Secret Question        Month of Birth

Secret Answer *

Submit

Forgotten your secret answer?
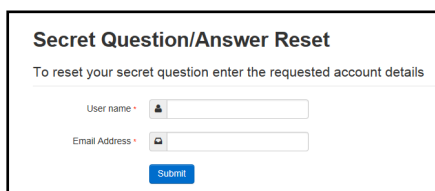
4. Access your registered email account and open the email received.

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.

# *04* | **Configuration**

Only users who belong to groups that have the General Site Administrator business process set to Read-Write can access the portal administration functions. This business process gives access to provider portal admin features, but not to School Admissions Portal-specific functions. The General Site Administrator business process is part of the Provider Portal main business process and can be assigned in the v4 Client via **Tools | Permissions | User Group Processes**.

For more information on assigning permissions, see the *System Managing Users, Groups & Permissions* handbook, available from the [One Publications](#) website.

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. |
| | Provider Home Guidance Text | Displayed on the **Home** page. |
| | About<br>Contact Us<br>Cookies Policy<br>Privacy Notice<br>Terms and Conditions<br>Version and Licensing<br>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). |
| Address | Address Registration | Guidance text displayed for address fields. |
| Module specific | | Guidance text and other text displayed on module-specific pages. |
| 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. |
| Report | | Guidance text for reports. |
| Site Titles | Site Title | Displayed at the top right-hand side of every page. |
| Tooltip | Tooltip for New Password | Displayed when user sets up a new password. |

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



2. From the **Choose a text category** drop-down, select the category of text to be configured.
3. Alternatively, enter search criteria, click the **Search** button and select the text.
4. Select the **Default** or **Welsh** tab to determine the text language.
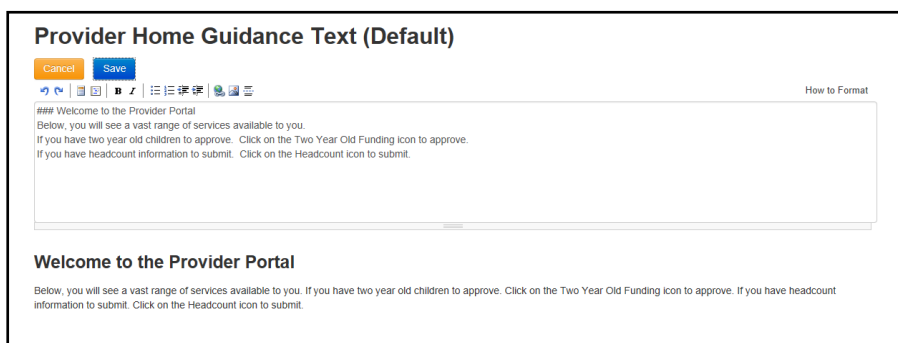5. Click the **Add** button.



6. Enter required text in the formatting panel. Formatting buttons are provided above the panel.
7. The formatted text is displayed beneath.
8. Click the **Save** button.

> **NOTE:** *This topic provides an overview of text configuration in the Provider Portal. For specific information on configuring each screen of the School Admissions Portal, see the* Customising the School Admissions Portal *handbook, available from the One Publications website.*

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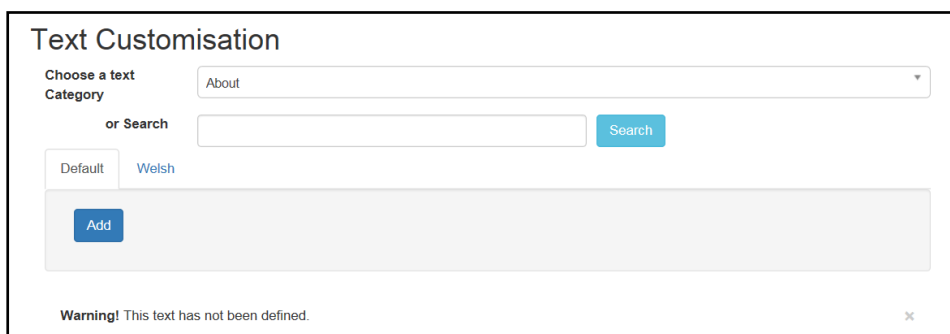


2. From the **Choose a text category** drop-down, select the category of text to be configured.
3. Select the **Default** or **Welsh** tab to determine the text language.
4. Click the **Edit** button.



5. Make the required changes to the text displayed in the formatting panel. Formatting buttons are provided above the panel.
6. The amended text is displayed beneath.
7. Click the **Save** button.

# Configuring the Provider Portal

1.  Select **Administration | Site Setup | Configuration** to display the **Manage Configurations** page.

## Manage Configurations

| Configuration Key | Configuration Value | ⚠ |
|---|---|---|
| Include the admin on emails sent | OFF | |
| The from email address used when messages are sent | admin@capita.co.uk | |
| When sending lots of emails, batch them up into groups of this size | 30 | |
| Maximum messages to show on the home page | 10 | |
| Is second factor authentication enabled | OFF | |
| Is Mini Profiler enabled | ON | |
| The Portal url | | |
| Google Analytics tracking id | | |
| Account lockout time span in minutes | 4 | |
| Maximum failed Verification Code attempts | 9 | |
| Pop-up message expiry time in seconds | 16 | |

Cancel    Save

2.  For each **Configuration Key**, change the **Configuration Value,** if required:

3.  If required, set **Include the admin on emails sent** to **On**.

4.  Enter an email address for: **The from email address used when messages are sent**.

5.  Enter a number for: **When sending lots of emails batch them up into groups of this size**.

6.  Enter the number of **Maximum messages to show on the home page**.

7.  If required, set **Is second factor authentication enabled** to **On**.

8.  If required, set **Is Mini Profile enabled** to **On**.

9.  If required, enter **The Portal url**.

10. If required, enter the **Google Analytics tracking id**.

11. If required, enter the **Account lockout time span in minutes**.

12. If required, enter the **Maximum failed Verification Code attempts**.

13. If required, enter the **Pop-up message expiry time in seconds**.

14. Click the **Save** button.

> **More Information:**
>
> For more information regarding portal configuration, refer to the *Technical Guide: **Deploying and Configuring the One Provider Self Service Portal for Local Authorities***, which is available on My Account.

# Reviewing Users

## Introduction

The **Review Users** page is used to view the users that are currently registered to use the Provider portal, to update their email address and enable them to update their password. It is also used to reset a user account that is inactive in the v4 Client.

*NOTE: When a system administrator logs into the portal, their account is displayed as read-only.*

## Viewing User Details

1. Select **Administration | Review User** to display the **Review Users** page.



2. If required, enter a partial **User Name**, **Description** or **Email** address and click the **Search** button.

## Updating a User Email Address

To update the user's **Email** address:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Enter a new **Email** address and click the adjacent update button.

## Resetting a User Password

If a user has forgotten their password, to enable them to reset their password:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Click the **Reset Password** link to send an email to the current **Email** address asking the user to update their password.

*NOTE: Clicking the **Reset Password** link displays the **Reset Account** link in the **Action** column until the user resets their password. When the user resets their password, they receive an email to let them know that their password has been changed successfully. The **Reset Account** link is then removed from the screen.*

# Resetting a User Account

If the user account is set to inactive in the v4 Client, the **Reset Account** link is displayed in the **Action** column and the **Active** status is displayed as a red cross as shown in the following graphic:



To reset an inactive account and set the status to active in the v4 Client:

1. Select **Administration | Review User** to display the **Review Users** page.

2. Click the **Reset Account** link.

> *NOTE: The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see <u>Resetting a User Password</u> on page 11*

# *05* | **Using the School Admissions Portal**

## Accessing the School Admissions Portal

Only One users who meet all the following criteria can access the School Admissions Portal:

- Has a recorded email address.

- Account is mapped to a school (base).

- Associated LA has a valid licence key for Portal School Admissions.

- Belongs to a user group that has at least read permissions to at least one of the following business processes (set up in the v4 Client via **Tools | Permissions | User Group Processes | Permissions Editor | Main Processes | Provider Portal**):

  - School Admissions – Verification Siblings = **Verify Applications**

  - School Admissions – View Applications & Allocations = **View Applications**

| | | | |
|---|---|---|---|
| School Admissions - Ranking | | ✔ | |
| School Admissions - Update In Year Offer Statuses | | ✔ | |
| School Admissions - Verification Siblings | | ✔ | |
| School Admissions - View Applications & Allocations | ✔ | | |
| School Admissions - View Uploaded Files | ✔ | | |

The **Provider Portal Home** page displays the modules for which your LA has a licence for.

Users who do not have access to any other Provider Portal areas are taken directly to the School Admissions Portal landing page after logging in.
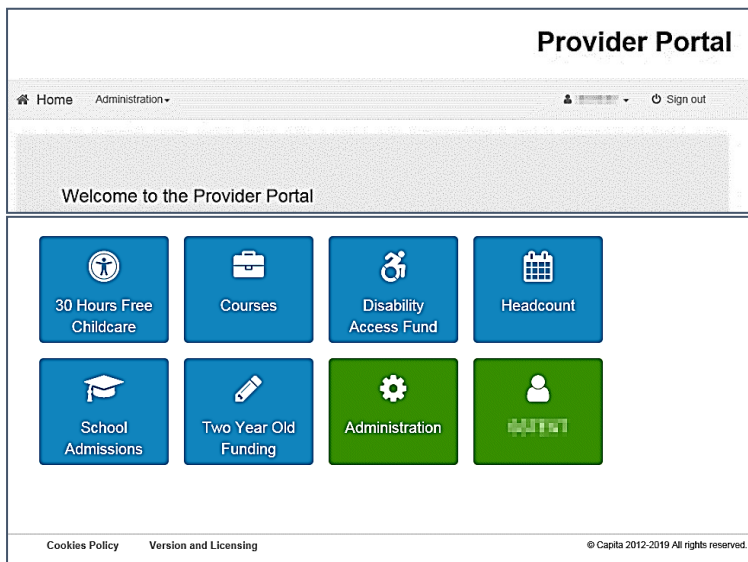


Select the **School Admissions** tile to display the **School Admissions** portal landing page.

# The School Admissions Portal Landing Page

The landing page is displayed when you first log in to the School Admissions Portal. It displays relevant transfer groups as a series of tiles.

Each **Transfer Group** displays **View Applications** and **Verify Applications** links according to the access rights you have been granted.

If the school you are mapped to has no applications against a **Transfer Group,** you will not see the tile for that **Transfer Group**.

| ▬▬ TG | ▬▬ TG |
|---|---|
| 🗗 View Applications | 🗗 View Applications |
| ◔ Verify Applications | ◔ Verify Applications |
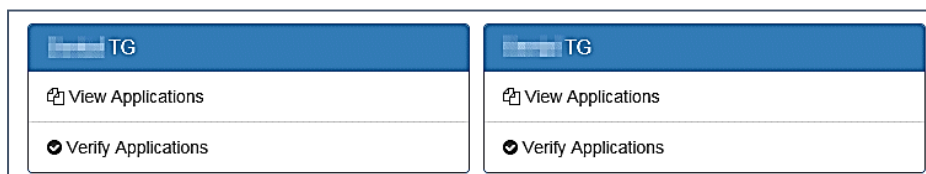
Only transfer groups that match at least one of the following sets of criteria are displayed:

- The school you are mapped to is a receiver school for an active normal transfer group whose **Transfer Group Year** matches either the current year or the current year plus one (e.g. if the current year is 2015 then One would display active transfer groups with a **Transfer Group Year** of 2015 or 2016).

- There is at least one preference for your receiver in the transfer group for a non-withdrawn application.

**OR**

- The system date month is between September to December inclusive.

- The school you are mapped to is a receiver school for an active normal transfer group whose **Transfer Group Year** matches the current year plus two.

- The Transfer Group NCY is 0.

- There is at least one preference for your receiver in the transfer group for a non-withdrawn application.

**OR**

- The school you are mapped to is a feeder school for an active normal transfer group whose **Transfer Group Year** matches the current year or the current year plus one.

**OR**

- The school you are mapped to is a receiver school for an active in year transfer group whose **Transfer Group Year** matches the current year or the current year minus one.

- There is at least one preference for your receiver for a non-withdrawn application.

Each transfer group tile has the following options that you can perform on that particular transfer group:

- **View Applications** – covered in the *Viewing Applications* topic.

- **Verify Applications** – covered in the  *Verifying Applications* topic.

# Admissions Transfer File

**Admissions Transfer File** is sent from a Local Authority to the schools in that Local Authority. The ATF file contains details of students to whom offers will be made. The file is in the same format as the CTF file (Common Transfer Format file) except that:

- An ATF file may not contain a UPN (Unique Pupil Number) if the student either does not currently have one or the number is not known to the sending Local Authority.

- ATF files must contain an application reference number.

- ATF files do not include containers for assessment (attainment) or attendance information. When a file is created in March, it does not include any Key Stage 2 data. Any attendance data only relates to the period up to the date that the file is created.

- The contacts included in the ATF file are restricted to the applicant (the person who applied for the school place) as the first contact (or equal first) and then any contact from the Local Authority database who has parental responsibility.

The ATF file export process also exports active v4 SEN assessment involvements for those Local Authorities that have migrated SEN to v4.

## ATF Download

**ATF Download** is available on the landing page of School Admissions. This feature allows Schools to download the file from the School Admission Portal sent from their local authority for the following groups:

- Primary Transfer Group
- Secondary Transfer Group and,
- In Year Transfer Group (Year XXXX)



This functionality allows Schools to download the file by selecting the Downloads symbol (as shown above). This action launches the **Downloads** screen which provides the following options presented for **Student Selection from EMS**:

- All allocated and Provisional Student (Y/A/P)

- All Allocated Students (Y/A)

A third line will be generated for *with DOB between* if the second option is selected.

see graphic below.
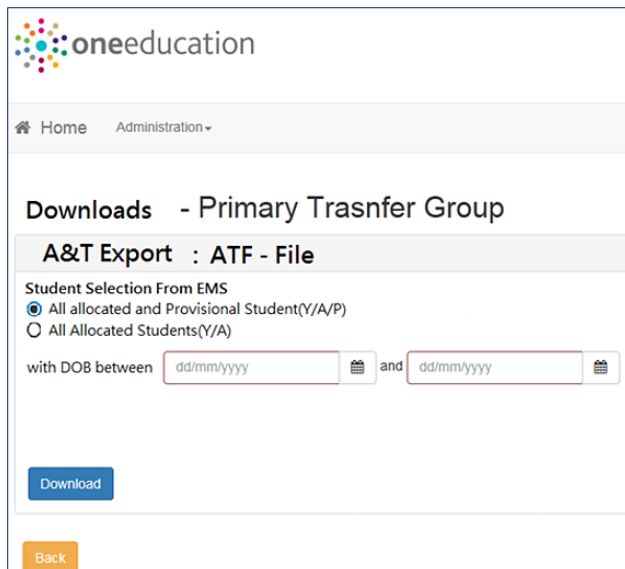
To download the file click on Download button at the bottom of the page.

The dialogue below will appear.



This file may be generated as many times as required if there are changes to the list of students.

Example file name (ATF):

- **Local Authority 933 to School 4500**: 933LLLL_ATF_9334500_05001.XML

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported. This number will not increment automatically if the file is downloaded by schools via the School Admissions Portal.

# ATF Permission

To enable the **ATF Download** functionality the following Permission and System Defaults will need to be set as shown in the graphics below:

**New Permissions:** School Adminissions – Download ATF Files

## System defaults

In the Filter field type ATF and set the Parameter value as shown in graphic below:



# Viewing Applications

From the School Admissions portal home page, click the **View Applications** hyperlink for the transfer group you wish to view.

The **Applications** page enables you to perform the following tasks:

- View a list of applications made to your school for a selected transfer group.
- Respond to in year applications made to your school.

The page displays a **Receiver Summary** panel.

Once you have opened the **Applications** page, you can perform the following optional actions:

■ Enter a student name or ID into the search field on the left to highlight a particular student in the list.

■ Select an offer status from the **All offer statuses** menu to filter the list by offer status.

■ Use the **Show/Hide columns** menu to edit the information displayed about each applicant:

    i. Click the **Show/Hide columns** button to display the **Show/Hide columns** dialog.
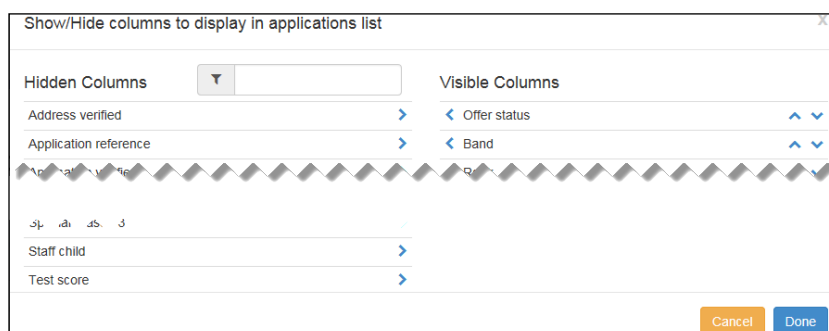


    ii. Click the names of any of the columns in the **Hidden Columns** list that you wish to make visible. The column names are transferred to the **Visible Columns** list.

    iii. Click the names of any of the columns in the **Visible Columns** list that you wish to hide. The column names are transferred to the **Hidden Columns** list.

    iv. If required, edit the order of the columns in the **Visible Columns** list using the arrows at the side of each column name.

    v. Click the **Done** button to save your changes and close the dialog.

■ Click the **Download** button to export the list of applicants and all displayed data as a .csv file.

■ View further details of a particular student's application by clicking on the student's name.
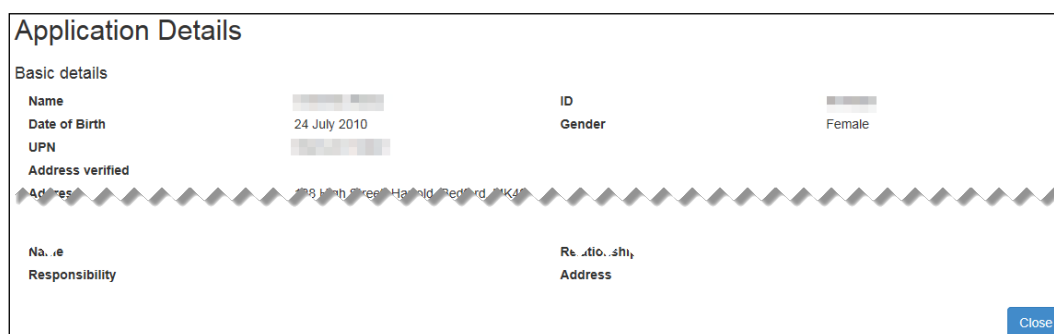


# Verifying Applications

To verify an application, permission should be granted for the **School Admissions – Verify Siblings** process in the v4 Client via **Tools | Permissions | User Group Processes | Permissions Editor | Main Processes | Provider Portal**.

There are 3 aspects of an application which can be marked as verified:

■ **Application** – see *Verify Application* on page *19*.

■ **Address** – see *Verify Address* on page *20*.

■ **Sibling** – see *Verify Sibling* on page *20*.

The meaning of 'verified' for each of these items should be agreed between the Education Authority and their schools.

From the required Transfer Group, select the **Verify Applications** link to display the **Verify Applications** page containing a list of all students with an application to be processed.

Click the **Download** button to create a .csv file of all the students in the list.



Use the first filter to select a student by Name or ID.

The verification filter can be used to select the following options:

- All verified and unverified records
- All verified records
- All unverified records
- Verified siblings only
- Unverified siblings only
- Verified addresses only
- Unverified addresses only
- Verified applications only
- Unverified applications only.

# Verify Application

To verify an application:

1. On the transfer group, select the **Verify Applications** link to display the list of students.
2. Use the filter to select one of the following:
   - All verified and unverified records
   - All unverified records
   - Unverified applications only
3. In the **Application verified** column, use the dropdown on the **Not verified** button and select **Verify**. The button changes to **Verified**.

4.  If required, click the **Download** button to create a .csv file of the updated records.

# Verify Address

To verify an address:

1.  On the transfer group, select the **Verify Applications** link to display the list of students.

2.  Use the filter to select one of the following:

    ▪ All verified and unverified records

    ▪ All unverified records

    ▪ Unverified addresses only

3.  In the **Address verified** column, use the dropdown on the **Not verified** button and select **Verify**. The button changes to **Verified**.



4.  If required, click the **Download** button to create a .csv file of the updated records.

# Verify Sibling

To verify a sibling:

1.  On the transfer group, select the **Verify Applications** link to display the list of students.

2.  Use the filter to select one of the following:

    ▪ All verified and unverified records

    ▪ All unverified records

    ▪ Unverified siblings only.

3.  In the **Sibling verified** column, use the dropdown on the **Not verified** button and select **Verify**. The button changes to **Verified**.



4.  If required, click the **Download** button to create a .csv file of the updated records.

# Index